User's Guide

Lotus® Domino.Doc 3.5

IBM®

Contents

About this book

This book describes how to use Domino.Doc®, the solution for organizing, managing, and storing critical business documents, and for making them accessible throughout the organization. Because Domino.Doc was designed to be used with any Web browser, Windows® Explorer, a Lotus Notes® client, or an integrated application, differences in the interface or functionality are noted in this book.

Chapter 1, "Introducing Domino.Doc," highlights what is new in this release, and gives an overview of Domino.Doc: its features, users, and architecture.

Chapter 2, "Getting Started," describes how to install and set up the Domino.Doc Client components.

Chapter 3, "About File Rooms and File Cabinets," gives a brief overview of these Domino.Doc components.

Chapter 4, "Working with Binders," describes how binders are used in general in Domino.Doc.

Chapter 5, "Working with Documents," describes what you need to know when working with documents in Domino.Doc from any interface.

Chapter 6, "Working with Domino.Doc from the Notes Client," explains how to navigate and work in Domino.Doc from the Notes® interface.

Chapter 7, "Working with Domino.Doc from a Browser," explains how to navigate and work in Domino.Doc from the browser interface.

Chapter 8, "Working with Domino.Doc from an Integrated Application," explains how to navigate and work in Domino.Doc from an integrated desktop application.

Chapter 9, "Working with Domino.Doc from Windows Explorer," explains how to navigate and work in Domino.Doc from the Windows Explorer interface (Domino.Doc Neighborhood).

Chapter 10, "Integrating Domino.Doc with E-mail," explains how to incorporate information from a Domino.Doc library into e-mail and preserve information from e-mail by saving it to Domino.Doc.

Chapter 11, "Working with Lotus Workflow," provides an overview of how Domino.Doc and Lotus® Workflow interact, and provides instructions for initiating workflow processes and viewing process status from Domino.Doc.

Chapter 12, "Troubleshooting," identifies some common problems you could encounter and gives solutions or workarounds.

Where to find more information

For more information on Domino.Doc, including documentation on best practices, known issues, support, and future enhancements, see the following resources:

- The Domino.Doc home page — http://www.lotus.com/dominodoc
- ReadMe.txt, located on the Domino.Doc CD-ROM
- ReadClnt.txt, located on the Download Client Software page
- The Lotus Support Home page — http://www.ibm.com/software/lotus/support

Chapter 1
Introducing Domino.Doc

This chapter introduces the highlights of this release. It describes Domino.Doc and gives an overview of its features. It also describes how the various types of users work with the Domino.Doc components.

This section contains:

- What's new in Domino.Doc
- About Domino.Doc features and architecture
  - Domino.Doc features
  - The Domino.Doc architecture
- About Domino.Doc roles
- About Domino.Doc and integrated applications
- About Domino.Doc and supported applications
- About Domino.Doc in a distributed environment
- Domino.Doc and accessibility

What's new in Domino.Doc

New features and enhancements in Domino.Doc 3.5 and Domino.Doc 3.1 are listed with a brief description below.

Domino.Doc 3.5

Domino.Doc 3.5 provides enhancements to the desktop client including tighter integration with desktop applications and e-mail, and improved multilingual support.

Desktop application integration
Domino.Doc now provides two ways to integrate with Microsoft® Office 2000 and 2000/XP: a new native office event integration and the updated ODMA integration. Both interfaces provide a look and feel more closely aligned with Microsoft Office applications. Another new feature lets the user choose whether to include Domino.Doc information such as the cabinet name and binder name when displaying document properties.

Viewing revision documents

When accessing Domino.Doc via an integrated application or the Domino.Doc Neighborhood Windows Explorer interface, users can choose which document revision they want to open.

Domino.Doc Neighborhood

Further enhancements to the Windows Explorer client include the ability to set a default library, create a new library connection by clicking an icon, and edit connection properties. In addition, users can sort Domino.Doc folder contents by title, author, and so on depending on the context, view documents in their native applications, and repeat a search by choosing from a list of recently used search strings.

Domino.Doc Desktop Administrator

The new Desktop Administrator replaces the Desktop Enabler interface, and provides an easy way to view and change Domino.Doc settings.

Notes and Outlook e-mail integration

Users can access their Domino.Doc libraries while using Notes or Outlook® e-mail. New features include the ability to attach a document from a Domino.Doc library to an e-mail, and save an e-mail attachment to a Domino.Doc library. Users can also import the contents of a document from a Domino.Doc library into the body of an e-mail, and export the body of an e-mail (excluding any attachments) as a document to Domino.Doc.

Improved multilingual support

Unicode support gives users the ability to view and edit Domino.Doc information from different locales without changing regional settings.

Domino.Doc 3.1

Domino.Doc 3.1 includes enhancements to the Windows Explorer and Desktop Enabler clients, changes to security, K-station™ integration, UTF-8 support for users based in different locales who need to work with documents in their native language, and enhanced API support.

Enhanced Explorer and Desktop Enabler clients

Windows Explorer users can move documents to different binders, create bookmarks to documents, add documents to and remove them from the favorites list, access documents' revision history, and view any previous revision of a document. The Explorer client also supports viewing and printing document view files.

Explorer and Desktop Enabler clients have improved profile field support for numbers, dates, and times, multiple values, multiple keywords, and computed fields.

Web browser interface and Notes folders

When using a browser to work in a file cabinet that uses Notes folders to display its table of contents, clicking the document title displays the document profile. To launch the attachment, click the document title to launch the profile, and then choose View from the Document menu at the top of the profile.

Security changes

When setting document security via the Notes client or a browser, users can selectively include or exclude individual members of a group from access to the document.

K-station integration

Lotus K-station users can use a 1-frame view instead of the standard 4-pane view when they want to access a particular Domino.Doc library or file cabinet.

Improved multilingual support

UTF-8 support lets users work concurrently in their respective Domino.Doc libraries, rooms, cabinets, categories, binders, and documents in their own language.

Enhanced API support

For a detailed list of what's new or changed, see Appendix B in the *Domino.Doc Programmer's Guide*.

About Domino.Doc features and architecture

Domino.Doc is the document management solution built for today's world of distributed, network-based computing. These organizations need to manage and share documents in a variety of formats among different users and groups.

Domino.Doc is the solution for organizing, managing, and storing all of your critical business documents, and for making them accessible inside and outside your organization.

Running on the Lotus Domino™ Server, Domino.Doc supports ODMA (Open Document Management API). ODMA support allows you to create, save, and retrieve documents through the ODMA-supported applications you are accustomed to using.

Built on the common storage metaphor of file rooms, file cabinets, binder categories, binders (folders), and documents, Domino.Doc is familiar and, therefore, easy to learn and use — directly from Notes, a Web browser, your authoring application, or Windows Explorer.

Domino.Doc features

All of the traditional document management features are included in Domino.Doc. Unlike traditional document management products, however, these tools are available in an open, Web-accessible, distributed, collaborative environment.

Features include:

- **ODMA** (Open Document Management API) **compliance,** allowing users to work in the applications that they are accustomed to, such as Microsoft Office and Lotus SmartSuite®. They can use these applications to open or save documents in Domino.Doc.
- **Security** at the library, file cabinet, binder, and document level.
- **Check-in and check-out** functions to ensure document integrity when multiple users want to edit or manage the same document simultaneously.
- Ability to **search** across multiple file cabinets within the library and receive a single view of the results.
- Ability to store **multiple versions** of a document in order to track revisions and provide a comprehensive **audit trail** of activity.
- **Cross-domain replication** for accessing Domino.Doc replicas from different domains.
- **Server-to-server replication** for distributing file cabinets and file cabinet content to remote locations.
- **Life cycle management** for authoring, reviewing, approving, releasing, and archiving documents.
- **Lotus Workflow integration** for initiating workflow processes and accessing workflow job status managed within Lotus Workflow.
- **Sametime**® **integration** for providing real-time online status of document editors and managers.
- **Windows Explorer integration** for using the familiar file manager to work with Domino.Doc.
- **Full Web browser support** for all end-user activities.

The Domino.Doc users

Domino.Doc users are knowledge workers who need to create, maintain, share, store, locate, and retrieve a collection of documents.

- **Application Designers** customize the Domino.Doc file cabinet template and create new ones.
- **Site Administrators** create and maintain Domino.Doc libraries.

- **Library Administrators** set up and configure the Domino.Doc infrastructure.

- **File Cabinet Creators** perform the day-to-day Domino.Doc activities including creating new file cabinets and modifying file cabinet, binder, and document user lists.

  A File Cabinet Creator may also be an Editor.

- **File Cabinet Managers** are Administrators of the file cabinet who can create documents and binders, view and edit all documents and binders, check in documents and binders that are checked out by other users, and change security settings for all binders.

- **Editors** create and modify document content. They also create and modify binders.

  An Editor may also be a File Cabinet Manager.

- **Draft Editors** can perform the same functions as Editors, but have the additional privilege of being able to modify drafts.

- **Readers** locate, view, and use completed documents.

The Domino.Doc architecture

Built on the common storage paradigm of file room, file cabinet, binder category, binder (folder), and document, Domino.Doc is familiar and, therefore, easy to learn and use.

Domino.Doc extends the basic Notes replication feature to deal with some important issues specific to document management. Unlike many Notes applications, Domino.Doc consists of a collection of interdependent databases. The number of databases in the collection changes over time, as file cabinets are created or deleted. Domino.Doc therefore provides support for automatically creating or deleting replicas as file cabinets are created or deleted.

The Library
The library is the entry point into Domino.Doc. It is the "main view" or the "home page" from where the user navigates the storage system and accesses administrative functions. Navigating the storage system, the user can:

- Perform searches
- List checked-out documents
- List favorite binders and documents
- List documents by life cycle status

The user can access administrative functions to perform tasks such as:

- Setting and changing document definitions and attributes
- Setting and changing binder type definitions and attributes
- Managing replication tasks

The File Room

The file room provides for logically grouping individual file cabinets to facilitate navigation. All file cabinets are contained in a file room. When a new file cabinet is created, the user has the option of adding it to an existing file room, or creating a new file room. File cabinets can be in multiple file rooms.

The File Cabinet

Domino.Doc uses file cabinets to organize and manage binders and documents. Domino.Doc uses the file cabinet as a single, logical way to view, store, retrieve, manage, and distribute all the documents contained in Domino.Doc.

The Domino.Doc Administrator and the File Cabinet Creator can create and manage file cabinets. Only the Domino.Doc Administrator can delete, or move, file cabinets. These activities must be performed using Notes at the Domino™ server.

The file cabinet creator can have an e-mail message sent to everyone who can access the file cabinet, notifying them that they have been selected to collaborate on a document (or set of documents) contained in the file cabinet. The notification will contain links to the file cabinet that the user can access by simply clicking the link icon.

Binder Category

The binder category provides for logically grouping individual binders to facilitate navigation. All binders are contained in a binder category. When a new binder is created, the user can add it to an existing category, or create a new binder category. Binders can be in multiple binder categories.

Binders

The Domino.Doc binder is a container within a file cabinet that is used to group documents logically. A binder can exist in only one file cabinet.

Each binder has attributes that facilitate organization and retrieval. System-generated attributes associated with every binder include the title, type, author, creation date, modification date, and number of documents.

User-defined attributes can be applied to every binder within the file cabinet regardless of binder type. Application attributes, presented in a dynamic subform located just below the system-generated attributes, are specific to the binder type.

Access to binders is limited to authorized users. Access to documents within the binders is limited by binder access. However, because the content of a binder is the set of documents it contains, a user must have Editor access to both the binder and the document in order to add documents to, or remove them from, the binder.

The check-in/check-out feature is used to modify binder security settings and attributes.

Binders can be grouped in categories to facilitate organization of large collections of documents.

Documents

A document in Domino.Doc is the information that is being managed. It can be a data file like a word processed document or a spreadsheet, an OLE object, or a Notes document. It is given a descriptive title and saved in a binder, within a file cabinet.

Each document has attributes, or meta-data, that facilitate document organization and retrieval, generally describing the piece of information that is saved in the document repository. System-generated attributes are associated with every document and may include, for example, the document author, creation date, date of last modification, or document title. Application attributes are specific to the individual application and may include, for example, the project name, document type, or proposal number. These attributes are configurable.

Access to document content and attributes is limited to authorized Readers, Editors, and Document Managers. Access can be controlled from the file cabinet or binder level, and inherited at the document level, or defined at the document level by the manager of the document.

The check-in/check-out feature of Domino.Doc ensures that only one user can modify a document at a time. When the document is checked out, it is locked in Domino.Doc. When it is checked back in, it can be as a new draft, a new version, or an update.

If the user is not working in the master file cabinet and cannot connect to it, a check-out request may be sent to the master file cabinet. In this case, the user will get a provisional lock on the document and a working copy for editing. If the document is modified by someone else after the request is sent, the user will be informed that differences (conflicts) exist between the working copy and the master document that must be resolved. The user can either discard the changes or selectively merge changes into the master document.

About Domino.Doc roles

Domino.Doc users assume a variety of roles for creating, managing, and using the system components. The roles are:

- Site Administrator
- Library Administrator
- File Cabinet Creator
- File Cabinet Manager
- Editor
- Draft Editor
- Reader

Site Administrators

If you are a Site Administrator, you can create and maintain Domino.Doc libraries. Refer to the *Domino.Doc Administrator's Guide* for information on how to perform these activities.

Library Administrators

If you are an Administrator, you can do the following:

- Create file cabinets
- Manage security for all file cabinets
- Delete, move, or connect file cabinets
- Set up, create, and delete Domino.Doc replicas
- See a list of everyone's checked-out binders and documents
- See a list of everyone's favorite binders and documents
- See a list of all documents by life cycle status
- See a list of everyone's last ten recently edited items
- Add new types to the file cabinet template, and create binder and document types in the library
- Change the settings in the System Profile (which includes managing the list of Administrators and File Cabinet Creators)
- Delete entries from the Log
- Create ODMA file associations

Refer to the *Domino.Doc Administrator's Guide* for information on how to perform these activities.

File Cabinet Creators

If you are a File Cabinet Creator, you can do the following:

- Create file cabinets
- Connect file cabinets
- Manage security for file cabinets that identify you as Manager
- Add new subforms to the file cabinet template
- Create binder and document types in the library

Refer to the *Domino.Doc Administrator's Guide* for information on how to perform these activities.

File Cabinet Manager

If you are a File Cabinet Manager you have Administrator privileges in the file cabinet to do the following:

- Create documents and binders in the file cabinet
- Check in documents and binders that are checked out by other users
- View and edit all documents and binders in the file cabinet
- Change security settings for all documents in the file cabinet

Editors

If you are an Editor, you can do the following:

- Create and modify documents
- Create and modify binders

Draft Editors

If you are a Draft Editor, you can do the following:

- Modify drafts of documents
- Create and modify documents
- Create and modify binders

Readers

If you are a Reader, you can do the following:

- Search for documents
- View documents
- See document versions (but not drafts)

About Domino.Doc and integrated applications

When using an integrated application, you can access Domino.Doc directly from your desktop application, rather than using a Notes client or browser to store or retrieve Domino.Doc documents.

Domino.Doc takes over the application's File - Open, File - Save, File - Save As, and File - Close menu items, so whenever you choose these commands, you can access the Domino.Doc library instead of the Windows file system. You can retrieve and save both existing and new documents in the Domino.Doc library without having to leave your familiar desktop application.

Domino.Doc currently works with these integrated applications:

- Lotus Freelance Graphics® 97, or later
- Lotus Word Pro® 97, or later
- Microsoft Excel 2000, XP, and 97
- Microsoft PowerPoint® 2000, XP, and 97
- Microsoft PhotoDraw® 2000
- Microsoft Word 2000, XP, and 97
- Microsoft Visio® 2000

However, because Domino.Doc complies with the Open Document Management API (ODMA), it can also integrate with other popular applications besides those listed here. ODMA support facilitates access to Domino.Doc during a single application work session where you open, check out, edit, and check in an existing document; or create, save, and check in a new document. If you need to, though, you can edit a document in multiple work sessions, saving intermediate changes to Domino.Doc to allow you to access your work in progress from the library in the next application work session. You can also view revisions of a document and choose the version you want to open.

If needed, you can use the Domino.Doc Attache Case to work with a document offline. For example, you may want to work on a document at home. Putting a document in the Attache Case creates a local copy that you can view or edit without being connected to a Domino.Doc Library.

For more information, see "About working with integrated applications" in Chapter 8, "Working with Domino.Doc from an Integrated Application."

About Domino.Doc and supported applications

Any application that is not integrated with Domino.Doc is a "supported" application. Domino.Doc can store and manage the content created by supported applications, but these applications work with Domino.Doc differently than integrated applications do. Domino.Doc does not replace or add options to the File menu or toolbar for supported applications.

When using a supported application, you can't work in an application-centric method. You'll need to go to a Notes client or browser to store or retrieve Domino.Doc documents. Then you can choose to view or edit the document, causing Domino.Doc to launch the associated application and open the document.

If you edit a checked-out document, you'll need to save it to the local file system, then check it in via one of the Domino.Doc clients (Explorer, browser, or Notes). When you check in the document, Domino.Doc retrieves it from the local file system, saves it, and checks it in.

When you use the Domino.Doc Neighborhood in Windows Explorer, you can open documents with file extensions from non-ODMA-supported applications such as Lotus 1-2-3®, Lotus Approach®, Notepad, Adobe Photoshop, Paint, and Macromedia Dreamweaver.

About Domino.Doc in a distributed environment

Domino.Doc lets you keep multiple copies (replicas) of any single database on multiple servers to allow users in various locations to access the same information. Replication is the process of exchanging modifications between replicas.

Domino.Doc uses server-to-server replication, a two-way exchange of information whereby each server alternately sends updates to, and receives updates from, the other:

- When a server sends updates to a replica on another server, it is considered the source server.

- When it receives updates, it is considered the destination server.

The Domino.Doc Transaction database communicates these updates, or "events," between the servers. The Transaction database also monitors this activity and controls access to your documents. New replicas are not actually created, nor are updates recorded, until the Transaction database replicates to the destination server.

The original Domino.Doc library, or master library, exists on the master server. Replicas of the master library can be installed completely (the library and all file cabinets), or in part (library only, file cabinets only) on any other Domino.Doc server.

The original file cabinet, or master file cabinet, can be created on any library replica. The master file cabinet exists on the server where it was initially created.

Each file cabinet has a "home library," the server where a file cabinet will look for a replica of the library database. In cases where a server contains both a library and file cabinets, the file cabinets will use a local copy of the library, so that the home server is the current server. In cases where a server contains only file cabinets, those file cabinets must use some other server to find the library database.

Home libraries are assigned by default during replica setup and file cabinet creation, but can be changed from within the Administration navigator of a file cabinet. When setting up a new replica server, if that server contains a library database, all file cabinet replicas on that server will use the library database on that server. If the new replica server does not contain a library database, the file cabinets use the master library server as the home library. Similar rules apply when creating new file cabinets. A file cabinet replica will use a library on the same server, if the library is available. If not, the file cabinet replica uses the library where the file cabinet was created.

There are relationships among the documents within a Domino.Doc database, and these relationships must be preserved during replication. For example, a document that you create with Domino.Doc has a current version, and may have a revision history. It is not possible to preserve relationships between documents if replication conflicts occur.

Domino.Doc prevents replication conflicts by designating certain replicas as "master replicas," then requiring that certain operations take place only in the master replica. Domino.Doc enforces this restriction in the following ways:

- Some operations can be performed only if you have opened a replica on the master server. For example, you must open the library database on the master library server in order to change the security for a file cabinet.

- Some operations can be initiated from any replica, but when initiated on a non-master replica, the operation issues a transaction request to be sent to the master replica. For example, when you check out a document from a non-master server, you can issue a Check-Out Transaction to the master replica server.

- Some operations can be initiated from any replica, but when initiated on a non-master replica, the operation opens the master replica and performs the operation there. For example, when you check out a

document from a non-master server, you can connect to the master replica and do the check-out there.

The Domino.Doc actions and their restrictions are outlined in the table below.

Database	Action	Restrictions
Library Actions	Search	None
	Download client software	None
File Cabinet Actions	Create new document	None
	Check out document	None
	Check in document	Restricted to the server from which the check-out occurred.
	Modify document, document profile, document security	Restricted to the server from which the check-out occurred.
	Delete document	Restricted to the server from which the check-out occurred.
	Move document to a different binder	Master File Cabinet
	View document	None
	Create new binder	None
	Check out binder	None
	Check in binder	Restricted to the server from which the check-out occurred.
	Modify binder profile, security	Restricted to the server from which the check-out occurred.
	Delete binder	Master File Cabinet
	Import files	None
	Search	None
	Create, delete, and search discussion documents	None
Desktop Enabler Actions	Open for view	None
	Open for edit	None
	Save As	None
	Save	Restricted to the server from which the check-out occurred.
	Close with check-in	Check-in is restricted to the server from which the check-out occurred.

Domino.Doc and accessibility

Domino.Doc is fully accessible from the Windows Explorer and integrated application clients, while the Notes client and browser client provide limited accessibility.

You can use the Explorer or an integrated application to perform most Domino.Doc tasks. In some cases, you must use the Notes client — for example, to perform administrative tasks such as creating libraries, cabinets, and binders, and set up binder and document types. You can use either the Notes client or the browser to initiate a review cycle or approval cycle.

To help users who have physical challenges, such as restricted mobility or limited vision, Domino.Doc supports the accessibility features described below.

Keyboard shortcuts

You can use the keyboard instead of the mouse to navigate Domino.Doc and access features in the different user interfaces (Windows Explorer, integrated applications, Notes, and browser).

For more information, see "Navigating Domino.Doc from Windows Explorer" in Chapter 9, "Working with Domino.Doc from Windows Explorer," and "Navigating Domino.Doc from an integrated application" in Chapter 8, "Working with Domino.Doc from an Integrated Application."

Supplementary information about the interface

Domino.Doc uses the following elements to provide information about the user interface:

- Visual focus indicators help you keep track of where you are.
- Textual information describes objects in the interface.
- Labels identify controls, icons, objects, and images.

Documentation

Domino.Doc documentation is available in Adobe PDF format in the Lotus Developer Domain Documentation Library at http://www.lotus.com/ldd/doc.

Chapter 2
Getting Started

You can navigate the Domino.Doc library and work with documents and binders using Notes, a Web browser, the Windows Explorer, or Domino.Doc integrated applications that you specify using the Domino.Doc Desktop Administrator.

This chapter describes the procedures you use to set up your interface with Domino.Doc:

- Installing the Domino.Doc client
- Setting up the Desktop Enabler
- Using the Desktop Administrator
  - Changing the log file settings
  - Specifying applications to use with Domino.Doc
  - Specifying document property settings
  - Setting up Internet connections
  - Specifying proxy server connection settings
  - Specifying secure connections
  - Removing temporary files
- Changing the Domino.Doc temporary directory locations
- Setting up for using the Windows Explorer interface
- Setting up for using a Web browser

Installing the Domino.Doc client

Domino.Doc libraries can be accessed from a desktop client using any of these interfaces:

- Lotus Notes
- Web browser (Internet Explorer or Netscape Communicator)
- Domino.Doc integrated applications
- Windows Explorer (Domino.Doc Neighborhood)

Note While users can manage binders and documents from the various client interfaces, all other administrative functions must be performed from the Notes client.

This section describes how to install software and set up your PC to access Domino.Doc from these interfaces. For information on system requirements, including supported browsers and Notes clients, see readme.txt.

Setting up the Desktop Enabler

The Domino.Doc Desktop Enabler lets you access the Domino.Doc Neighborhood via Windows Explorer, provides support for integrated applications that you can use with Domino.Doc, and lets you manage your local Domino.Doc settings from your computer via the Desktop Administrator.

Procedure

To install the Domino.Doc Desktop Enabler, perform the following steps:

1. Open the Domino.Doc Library. For example, from a Notes client, choose File - Database - Open, specify the name of the Domino server, and select the library database.

    (The Setup program put the Domino.Doc Library in the subdirectory that you specified for Domino.Doc with the name as *<libraryname>*Lib.nsf).

2. Do one of the following:

    • If you are using a Notes client, click Library Administration and then click Download Client Software.

    • If you are using a browser, click Getting Started and then click Download Domino.Doc Desktop Enabler.

3. Double-click DDSETUP.EXE.

    • If you are using a Notes client, click Launch.

    • If you are using a browser, choose the option to run the file. Depending on the browser, you may have to download the file to your workstation drive first. For example, if you see the Unknown File Type dialog in Netscape Communicator, click Save File. Then run DDSETUP.EXE from your workstation drive after the file is downloaded.

4. Accept the software license agreement.

    The Setup Welcome message displays.

5. To begin installing the Desktop Enabler files, click Next.

6. Select the type of install you want, accept or change the default drive and directory for the Desktop Enabler, and then click Next.

7. Follow the remaining onscreen prompts.

After you install the Desktop Enabler and restart your PC, you can use these two tools to access your Domino.Doc libraries:

- a shortcut to the Domino.Doc Neighborhood on your Windows desktop

- an icon for the Domino.Doc Neighborhood in the left pane of Windows Explorer

Using the Desktop Administrator

The Desktop Administrator lets you view current Domino.Doc settings and do the following:

- Change the Domino.Doc log file settings.

- Specify the integrated applications you want to use with Domino.Doc.

- Customize document property settings.

- Specify proxy server connection settings.

- Remove temporary files.

Note If you are using Domino.Doc on a workstation running Windows NT®, 2000, or XP, you must log in to the workstation using an Administrator ID to change some of the integrated application preferences and the HTTP server address and port.

Opening the Desktop Administrator
From the Windows Start menu, choose Programs - Lotus Applications - Domino.Doc Desktop Administrator.

Creating a Desktop Administrator shortcut
If you prefer to access the Desktop Administrator without navigating to it via the Windows Start menu, you can put a shortcut on your desktop.

1. Locate ddocadmin.exe in the file system.

2. Right-click on the file to display the context menu and then choose Create Shortcut.

3. Drag the shortcut icon onto the desktop.

Changing the log file settings

You can use the Domino.Doc Desktop Administrator to change the settings for the Domino.Doc log in order to report additional processing information that may help you troubleshoot ongoing problems.

For more information, see "About the Domino.Doc log" in Chapter 12, "Troubleshooting."

Procedure
To change the log file settings, perform the following steps:

1. Open the Domino.Doc Desktop Administrator.

    The Administrator displays the current Domino.Doc settings.

2. From the Settings menu, choose Preferences.

3. Click the Log File tab in the dialog box.

4. (Optional) Check "Verbose Logging" if you'd like the Log to report additional information.

5. (Optional) Check "Truncate Log File" if you'd like to start a new Log for each Domino.Doc session. Deselect this option if you'd like to continue adding to the Log from session to session.

6. Click OK.

Specifying applications to use with Domino.Doc

Use the Domino.Doc Desktop Administrator to specify the integrated applications that you want to use with Domino.Doc.

When you work in an integrated application, you can access Domino.Doc libraries through the dialog box that displays when you choose File - Open or File - Save As. The dialog box that you see depends on the application you are using.

For example, if you are using Lotus Word Pro or Freelance Graphics, you see a standard ODMA dialog box that lists the contents of the Domino.Doc Neighborhood.

If you are using a Microsoft Office application, you see a Domino.Doc Office dialog box that looks like the Office application's native dialog box and lists the files and folders on the local drive. You can also use Tools - Customize in your Office application to set up shortcut keys that will let you display the original Open dialog box or Save As dialog box whenever you want. For more information, see your Office application Help.

Procedure

To specify the integrated applications you want to use with Domino.Doc, follow the steps below. If you are using Domino.Doc on a workstation running Windows NT, 2000, or XP, the following restrictions apply:

- To enable Microsoft Office applications to use the Domino.Doc Office interface, log in to the workstation using your regular user ID, after the administrator has installed the Domino.Doc Desktop Enabler. Then, use the Desktop Administrator (as described below) to change the appropriate settings.

- To change which non-Office applications you can use with Domino.Doc, you must log in to the workstation using an administrator ID. Then use the Desktop Administrator to change the appropriate settings. If needed, contact your Domino.Doc administrator for assistance. You cannot change the settings for non-Office applications if you log in to the workstation using your regular user ID.

1. Open the Domino.Doc Desktop Administrator.

   The Administrator displays the current Domino.Doc settings.

2. From the Settings menu, choose Preferences.

   The Domino.Doc Settings dialog box appears.

3. Click the Application Preferences tab in the dialog box.

4. Select each application that you want to use with Domino.Doc.

   To use an ODMA-supported application that is not listed (for example, Microsoft PhotoDraw), select "Other Applications."

5. If you work with Microsoft Word or PowerPoint, you can choose whether to have the Open and Save As dialog boxes use the Domino.Doc Office interface or a standard ODMA interface:

   - To use Domino.Doc dialog boxes that look like regular Word or PowerPoint dialog boxes and display the contents of the local drive, select "Domino.Doc Office Dialogs."

   - To use standard ODMA dialog boxes that display the contents of the Domino.Doc Neighborhood, select "ODMA Dialogs."

   Note This option applies only to Word 2000 (or later) and PowerPoint 2000 (or later). If you are using Word 97 or PowerPoint 97, the dialog boxes will automatically use the ODMA interface.

   Tip No matter which setting you specify for PowerPoint 2000 (or later), pressing CTRL+O always displays the actual PowerPoint Open dialog box rather than the Domino.Doc or ODMA-style dialog box.

6. Click OK.

Specifying document property settings

If you use Microsoft Word, PowerPoint, or Excel with Domino.Doc, the following information is automatically added to the list of document properties:

- Library name
- Document revision number
- Cabinet name
- Binder name
- Document ID

For information on how to view and edit the Domino.Doc information, see "Working with Domino.Doc properties in Office documents" in Chapter 8, "Working with Domino.Doc from an Integrated Application."

Procedure
To prevent Domino.Doc information from being included with other Office document properties:

1. Open the Domino.Doc Desktop Administrator.

   The Administrator displays the current Domino.Doc settings.

2. From the Settings menu, choose Preferences.

   The Preferences dialog box appears.

3. Click the Office Fields tab in the dialog box.

4. Change the appropriate setting.

   For example, if you do not want the Domino.Doc information above to be included with document properties when you use Word, deselect "Add Domino.Doc information to Microsoft Word documents."

5. Click OK.

Setting up Internet connections

If you are using Internet Explorer, Domino.Doc uses your current Internet Explorer settings. Any connection settings that you change in Domino.Doc are automatically made to your Internet Explorer settings as well, and any settings you change in Internet Explorer are automatically made to the Domino.Doc Desktop Enabler settings.

Domino.Doc supports HTTP, HTTPS, and Notes protocols.

To set up Internet connections, you can:

- Specify proxy server connection settings.
- Specify secure connections.

Specifying proxy server connection settings

To interact with Domino.Doc users outside your intranet, you need to specify a proxy server. Your System Administrator can provide the proxy server information you need, including the proxy server, the port, and the names of local servers to bypass through the proxy.

Note If you are using Domino.Doc on a workstation running Windows NT, 2000, or XP, you must log in to the workstation using an Administrator ID to change the connection settings in the Desktop Administrator. If needed, contact your Domino.Doc Administrator for assistance.

Procedure

To specify proxy server settings in Domino.Doc:

1. Open the Domino.Doc Desktop Administrator.

   The Administrator displays the current Domino.Doc settings.

2. From the Settings menu, choose Preferences.

   The Preferences dialog box appears.

3. Click the Connection tab in the dialog box.

4. Check the option "Connect through a proxy server."

5. Enter the name and port (server) of the proxy to use.

6. In the Exceptions box, enter the complete name (including the domain) for each server within your own intranet.

7. Check the option "Do not use proxy server for local (intranet) addresses."

8. Click OK.

Specifying secure connections

If your Domino.Doc Server is enabled for SSL (Secure Sockets Layer), you can connect to it securely. You must address the library with the HTTPS protocol (https://myHTTPServer/librarynameLIB.nsf) to connect securely.

Removing temporary files

When you view Domino.Doc files using the Explorer, a browser, or the Notes client, Domino.Doc creates read-only copies of the files and stores them in a temporary file area on the local file system. You can clean up your local file system by deleting these read-only files periodically.

Note   You do not need to remove the temporary files that Domino.Doc creates when you are working with Domino.Doc integrated applications; Domino.Doc automatically removes these temporary files when you close the documents.

Procedure
To remove temporary files from the local file system:

1. Open the Domino.Doc Desktop Administrator.

   The Administrator displays the current Domino.Doc settings.

2. From the Settings menu, choose Clean Up Temp Space.

   Domino.Doc displays a message box to request confirmation.

3. To delete the files, click OK.

Changing the Domino.Doc temporary directory locations

Domino.Doc stores the file you access during a work session in a temporary directory installed as a subdirectory of Domino.Doc. If you'd like to change the location of this temporary directory for HTTP access, you can do so by editing a Domino.Doc registry entry. If you'd like to change the location of this temporary directory for Notes access, you can do so by editing a NOTES.INI entry.

Procedure for HTTP:
To change the location of the temporary directory for HTTP access, perform the following steps:

1. Click the Windows Start button.

2. Click Run.

3. Type "regedit" in the window.

4. Click OK.

5. Expand the key HKEY_LOCAL_MACHINE.

6. Expand SOFTWARE.

7. Expand Lotus.

8. Expand Domino.Doc Desktop Enabler.

9. Expand Paths.

10. Open Temp.

11. In the data column, change the location for the temporary directory.

Caution Do not change any of the other settings because Domino.Doc is dependent upon these entries.

Procedure for Notes:
If you'd like to change the location of the temporary directory for Notes access, edit the following line in your NOTES.INI file to the location of your choice:

$DOMINODOCDIR=c:\DominoDoc\TEMP\

Setting up for using the Windows Explorer interface

If you will be using the Windows Explorer interface (Domino.Doc Neighborhood), you must have the Domino.Doc Desktop Enabler installed. You also need to obtain from your Domino.Doc Library Administrator the URL for each library you will be using.

Connecting to the library
Libraries in Domino.Doc reside on a Domino Server that can be accessed either through an HTTP protocol or a Lotus Notes protocol. To use the Windows Explorer interface, you must establish a connection to your Domino.Doc library, or libraries. You can set up multiple library connections and navigate from one to the other. For information about creating a library connection by modifying the client registry, please see the *Domino.Doc Administrator's Guide*.

If you are not sure of your server or library name, consult your Domino.Doc Administrator. The address syntax for your server and Library is:

`Protocol://Server name/Domino.Doc library name`

For example:

- http://myHTTPServer/librarynameLIB.nsf
- https://myHTTPServer/librarynameLIB.nsf
- Notes://myNotesServer/domdoc/librarynameLIB.nsf

  Note For Notes protocol only, you must use the full path with the install directory (by default, /domdoc).

If you want to use a URL to access a library, the library name must be in the non-proxy list in the Web browser.

To access the library on the designated server:

1. Right-click on the Domino.Doc Neighborhood icon in the left pane of the Explorer, and then choose Connect Library from the context menu.

   Tip   You can also click Domino.Doc Neighborhood in the left pane, and then double-click Add Library Connection in the right pane.

   The Library Connect dialog box appears.

2. Enter the URL to the Domino.Doc library you want to access.

3. Enter a library display name.

   This is the name you want to assign to the icon that will take you directly to that library in future sessions. It does not need to be the exact name of the library.

4. Click OK.

5. If you are prompted for your User Name and/or Password, enter that information, and then Click OK.

If you have multiple libraries, you may want to repeat the connect procedure for each one at this time.

After you have once successfully connected to the appropriate address, the previously selected protocol is remembered and used the next time. The library connection persists, even if you restart your PC, until you disconnect the library.

In future sessions, you will be able to access a connected Domino.Doc library in either of two ways:

- Use the Domino.Doc Neighborhood shortcut on the Windows desktop to go directly to a window that displays the icons of previously connected Domino.Doc libraries.

- Use the left pane of the Windows Explorer to find the desired library icon under the Domino.Doc Neighborhood icon.

For information about setting up automatic library connections by modifying the client registry, see the *Domino.Doc Administrator's Guide*.

Setting a default library

The default library is used by the Favorites, Checked Out, and History buttons in the ODMA dialog box if you don't already have a library open. For example, if you have several library connections and choose File - Open in an integrated application, you can click Favorites in the location bar to automatically open the default library and navigate to the Favorites folder.

1. Right-click the icon of the library that you want as your default library.

2. Choose Set as Default Library.

Tip   You can also specify a default library by selecting a library connection in the right pane of Windows Explorer (or in the Domino.Doc Neighborhood window) and then choosing File - Set as Default Library.

If you don't specify a default library, the first library you connect to becomes the default.

For information on setting the default library by modifying the client registry, see the *Domino.Doc Administrator's Guide*.

Editing a library connection
After connecting to a library, you can edit the connection properties to change the URL and the library display name.

1. Right-click the icon of the library connection you want to edit, then choose Properties from the context menu.
2. (Optional) Edit the library address.
3. (Optional) Edit the library display name.
4. Click OK.

Note   If you are using Domino.Doc on Windows NT, 2000, or XP, you can edit only those library connections that you created.

Disconnecting the library
To disconnect a library, right-click its library icon and choose Disconnect Library.

The URL will be retained in the pull-down list in the Library Connect dialog box so that you can use it later to re-connect that library.

Note   If you are using Domino.Doc on Windows NT, 2000, or XP, you can delete only those library connections that you created.

For more information on using this interface, see "About working with the Windows Explorer interface" in Chapter 9, "Working with Domino.Doc from Windows Explorer."

Setting up for using a Web browser

For information on supported browsers, see the Domino.Doc release notes.

You need to obtain the library URL from your Domino.Doc Library Administrator. If you want to use the Discussion - Who Is Online feature from a browser, you must also have access to a Sametime server.

Note If you used an earlier version of Domino.Doc from your browser, you will need to replace any Bookmarks (Netscape Communicator) or Favorites (Microsoft Internet Explorer) to your libraries. Create a new bookmark or favorite when you enter the library, then use it and refresh the page.

Internet Explorer

If you are using Microsoft Internet Explorer, do the following:

1. Choose Tools - Internet Options.
2. On the General tab, under "Temporary Internet files," click Settings, and then select the "Every visit to the page" option.
3. Click the Advanced tab, scroll down to the Security section, and then deselect the "Do not save encrypted pages to disk" option.

Netscape Communicator

If you are using Netscape Communicator, do the following:

1. Choose Edit - Preferences.
2. Open the Advanced category, and then click Cache.
3. Set the memory cache and disk cache sizes to zero.
4. Select Never as the cache option.

You may also want to add a server, or servers, to the proxy settings.

While users can manage binders and documents from a Web browser, all administrative functions must be performed from the Notes client.

Chapter 3
About File Rooms and File Cabinets

Domino.Doc uses file rooms and file cabinets to organize and manage binders and documents.

This chapter provides general information about Domino.Doc file rooms and file cabinets:

- About File Rooms
- About File Cabinets

For more information about file rooms, and creating and managing file cabinets, refer to the *Domino.Doc Administrator's Guide*.

About File Rooms

The file room facilitates navigation by creating logical groupings, or categories, of file cabinets. Each file cabinet is contained in a file room. When a new file cabinet is created the creator may either add it to an existing file room, or create a new file room for the file cabinet. (This is the only way file rooms can be created.)

A file room cannot be deleted; rather, it ceases to exist when there are no longer any file cabinets associated with it.

The file room is visible to the user in the library hierarchy.

About File Cabinets

File cabinets are Notes database files that reside on the Domino server. They are created on the server by the Domino.Doc Administrator, or a user designated as File Cabinet Creator, who also manage file cabinets. All file cabinet management must be done from Notes, and by a person with the appropriate access level.

Because file cabinets are Notes databases, the forms necessary for entering information into a document, the views for accessing the information, and the application logic that automates the processes related to the document are all contained in the file cabinet along with the document content. When a file cabinet's content is secured and replicated, so are these elements.

About file cabinet users

Every file cabinet has a user group that defines who can access the file cabinet and what tasks users can perform. Users with registered Notes IDs and registered Web users whose names and passwords are stored in the Notes Public Name and Address Book can be in the user group. Non-registered users can also be put into the user group for purposes of reviewing and approving documents.

The file cabinet user group defines:

Readers — who can read documents, but they cannot create or edit documents stored in this file cabinet.

Editors — who can create documents and edit documents stored in this file cabinet, including those created by others.

Managers — who can modify the file cabinet's security and force document check-ins.

The file cabinet user group automatically applies to both binders and documents contained in the file cabinet, but the creator can change access on a per-binder or per-document basis.

If all users of the file cabinet should have access to all documents within the file cabinet, the administrator may disable binder security on the file cabinet. This gives all file cabinet readers and editors access to the binders in the file cabinet.

About customized file cabinets

The default file cabinet template is filecab.ntf. This template contains design forms and views used by the file cabinet. If your administrator created a customized copy of the template, the file cabinet can use the customized template, rather than the default, when appropriate.

About file cabinet replication

The Domino.Doc server-to-server replication feature lets you keep multiple copies, called replicas, of a file cabinet on multiple servers. Through replication, all of the replicas become essentially identical over time. For example, users in one office can make changes to a file cabinet replica on their server at the same time that users in another office make changes to a replica of the same file cabinet on their server. When the servers replicate, each file cabinet replica is updated with the information from the one on the other server.

A file cabinet can be created on any library, master or replica. That library becomes the file cabinet's 'home' server. If a file cabinet is created on a server where the library is a replica, the destination server becomes the home server for the file cabinet. If a file cabinet is created on a server where

the library is a master library, the master library server becomes the home server for the file cabinet. A replica of the file cabinet, in either case, will be added to any Domino.Doc server that is set up to replicate all file cabinets.

In general, whether a file cabinet is a replica or not is transparent to the user. However, checking out a document or a binder requires some special considerations.

Chapter 4
Working with Binders

Binders, in the Domino.Doc storage system, are containers within file cabinets used to logically group related documents. This chapter describes the overall features of binders and how to use them. Working with binders varies somewhat from one interface to another, and is thus covered in detail in the chapter describing each user interface.

Use these sections for general information about Domino.Doc binders:

- About creating binders
- About binder types
- About categorizing binders
- About the binder table of contents
- About binder security
- About finding and opening binders
- About checking out a binder
  - Handling binder check-out rejections
  - Resolving binder check-out conflicts
- About checking in a binder

About creating binders

Binders, in the Domino.Doc storage system, are containers within file cabinets used to logically group related documents. Every document resides in a binder. If you have Editor or Manager access to a file cabinet you can create a binder in it.

You can create a binder from any of the Domino.Doc user interfaces. Each interface has a New Binder option. If you are working in a Domino.Doc integrated application, you can create a binder as an additional step when you request to check in a document by performing a Save, or Save As, operation.

When creating a binder, you select a binder type. You also enter information to complete the binder profile, and optionally adjust the binder security settings. You can also categorize binders into logical groups and sub groups. By specifying a category for each binder you create, you make it easier to find.

About binder types

Every binder has an assigned Binder Type that associates a set of attributes with that binder.

Domino.Doc, as installed, includes several basic binder types. Administrators can create additional new types to meet users' needs. When Administrators, or File Cabinet Creators, create a file cabinet they specify the binder types that can be assigned to binders created in that file cabinet. Because every binder stored in a Domino.Doc file cabinet must have an associated type, the file cabinet creator also specifies a Default binder type that will automatically be assigned to any new binders that are created without a binder type specified.

Extended field attributes can be specified for the binder type to further define the binder and organize documents. For example, a binder type called "Account" might have the extended attributes Sales Manager and Sales Rep. Depending on your access rights, in addition to adding or removing documents in a binder, you can change these extended field attribute values in the profile.

You can create new binders at any time to hold new or existing documents. You can either select a binder type from the list of those specified for the file cabinet where you are creating, or let it assume the Default type. When you create a binder, you enter the specific attribute values for the binder type you have selected. If the creator of the binder type specified any of the fields to be required, you will not be able to save the new binder without entering the required information.

About categorizing binders

If your file cabinet has Notes folders specified for the design of the binder Table of Contents, and if your Binder Type subforms contain the required field, you can organize your binders into categories, and sub categories. Binder categories are displayed in the binder views in all the Domino.Doc user interfaces.

Categories can be collapsed or expanded when viewing the binder list.

A binder can exist in multiple categories.

An example of binder categorization is illustrated below. In the illustration, there are four binders: B1, B2, B3, and B4 grouped into two main categories: Compensation and Training. Both main categories have two sub categories: Employee and Management. In the example, B4 appears in both main categories.

When you create your binder, enter the category name in the binder profile. You can add a sub category by using a backslash (\). For example, use Training\Management to create a Training category with a Management sub category, and Training\Technical to add another sub category to Training. You can nest sub categories also. For example, use Training\Management \Boston, Training\Management \Chicago, and so forth to categorize the management training binders by city.

When specifying multiple categories, use a semicolon (;) to separate the categories. For example, Compensation\Employee;Training\Employee would put binder B4 into the Employee sub category in both Compensation and Training.
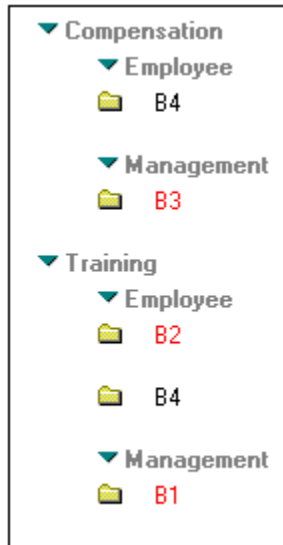
About the binder table of contents

When you have a binder open you see a list of all the documents stored in the binder, a Table of Contents. Two designs are available in Domino.Doc:

- BinderTOC ActiveX® control
- Notes folders

All binders in a given file cabinet have the same type of binder Table of Contents. The creator of the library selects one of the two designs to be the default for all file cabinets in the library. The File Cabinet Creator, however, can specify either design for that cabinet. Also, the File Cabinet Creator or the Administrator can change the design selection on any existing file cabinet.

BinderTOC ActiveX control

If your Administrator selected the BinderTOC ActiveX control to display the contents of a binder, you see the latest checked-in version of each document as an item in the list. You can access the associated working copy, drafts, review copy, and so forth from the Revision History. When you select a document you use the right mouse button to view the actions that can be performed.

This control provides the highest level of performance, giving the quickest access to the documents.

Notes folders

If you want to customize your binder design, you'll probably want Domino.Doc to use Notes folders for the binder Table of Contents design. When Notes folders for the binders Table of Contents is specified, administrators can customize how the binder Table of Contents appears in one or all file cabinets by creating custom views. The created views will display on the file cabinet Custom Views tab.

Notes folders customization can change the following:

- The order of the documents as presented in the view
- What information is displayed in the view (for example, the document title, version, type, author, and modification date)
- Categorization in the view
- Actions that may be performed in the view

Notes folders creation

The creator's access level determines when a binder folder gets created.

- If the creator is an Administrator or a Manager of the file cabinet, the folder is created immediately when a new binder is created.

- If the creator is an Editor, the folder is created on the server by the scheduled DelayedFolderCreate agent. In this case, there will be a delay between the creation of the binder and the creation of the folder. If you access the binder Table of Contents during this delay you will get an error message that the Table of Contents has not yet been created.

About binder security

Every binder has a user group that defines who can access it and what tasks users can perform. The binder user group defines the following users:

Readers — can view the binder; they cannot change binder properties, or add documents to the binder, or remove them from the binder.

Editors — can view and edit binder properties and profile information; they can add documents to the binder.

Managers — can modify the binder's security, delete the binder, move documents to a different binder, and edit all documents in the binder. The creator of a binder is its manager.

Binder security defaults from the file cabinet level. All File Cabinet Readers and Editors are automatically given access to the binders contained in the file cabinet. Any user can view a binder's security settings from any of the Domino.Doc user interfaces.

You can set binder security when creating a new binder, or let it default to the file cabinet user list. The binder user group is limited to the file cabinet user group, but the binder Manager (creator) can change the access, limiting access by removing users from the binder list, or reducing certain users level of access to the binder.

You can change binder security settings only if you have Manager access to the binder and have it checked out. Thus, you can change binder security only from the Notes client, or the browser interface. However, if binder security has been turned off for the file cabinet, the list of binder readers and editors cannot be changed. You cannot add any users not already in the file cabinet's user list. You cannot elevate the access level of a user. For example, if a user has Editor access, you can remove that user from the Editor list, but you cannot elevate that user to Manager.

When you change binder security, the security of all documents in the binder will be updated to reflect your changes when the binder is checked in. Specifically, if you remove a user from the binder access list, that user will be removed from the access list of all documents in the binder. Similarly, any users who are added to the binder access list, will be added to the access list of each document in the binder.

If a document is checked out when the binder is checked in, the security for that document will be updated when the document is checked back in.

Note If you are working in a non-master file cabinet, you must access the binder for editing from the same server where you requested the check-out to perform security changes.

About finding and opening binders

Domino.Doc provides several ways to find and open binders stored in its libraries from its several user interfaces.

If you know the file cabinet location, you can open the file cabinet and select the binder from the list. Other options are to add the binder to your favorites list, perform a search for text that you know to be in the binder, or look for it in the Checked Out binders list.

Favorite binders

When working in Domino.Doc, you can create "favorite" binders (and documents) for quick access directly from the navigation bar or panel.

If the favorites list contains the binder you are seeking you can open it directly by selecting it in the list.

You can access the favorites list from all of the Domino.Doc interfaces, but you must use Notes or the browser to add or delete them.

When you access a favorites view in the Domino.Doc library, you see only your own favorites, while Administrators see all favorites categorized by the users who created them.

Search results

You can locate a binder by searching for text that you know appears in the binder attributes, and that is unique to that binder, — or is likely to be found in only a few binders. By using Advanced Search you can reduce the number of hits by creating a very customized search string to narrow the field, as well as limiting the search to selected file cabinets. After you have found a binder by searching, it becomes an item in the search results list, making it possible to find it again later by looking in this list.

Checked Out binder lists

If a binder (or document) is checked out, it appears in the Checked Out binders list. You can see this list from any of the user interfaces.

About checking out a binder

The Domino.Doc check-in and check-out features help ensure the integrity of Domino.Doc binders.

You must check out a binder to modify its profile, or if you want to delete it from a non-master file cabinet. You must be an authorized editor to check out and modify a binder. You can check out binders only from the Notes client or from a browser.

When you request a binder check-out, several things happen depending on how your System Administrator configured file cabinet replication, and whether or not you are working in the master file cabinet.

If you are working in the **master file cabinet**, or if you can connect to it to do the check out, you can check out the binder immediately. This locks the binder so that other editors cannot modify it, and it creates a working copy of the binder for editing.

If you are working in the **file cabinet replica**:

- Check-outs may not be allowed. You'll be able to open the binder for viewing, but you won't be able to check it out for editing.

- You may be prompted for how you want to proceed. You'll be able to send a check-out request to the master file cabinet, or connect to the file cabinet and check out the binder immediately.

- You may have the option of sending a check-out request to the master file cabinet. This gives you a provisional lock on the binder, and a working copy for editing.

  When your check-out request arrives at the master file cabinet, one of three things will happen:

  - If the binder is not currently checked out, and it has not been modified by someone else since you obtained the provisional lock, the binder is checked out to you (locked) and you can continue to make changes, or you can check it back in.

  - If the binder is currently checked out to someone else, or if it has been deleted, your check-out request is rejected. You can cancel the request and discard your changes, or you can retry the request, maintaining your changes and keeping the binder provisionally locked.

- If the binder is not currently checked out, but has been modified since you requested the lock, it is checked out to you, but you must resolve any differences between your working copy and the master before you can check it back in. You can choose to discard your changes and check the binder back in, or you can selectively merge your changes into the master binder before checking it in.

Handling binder check-out rejections

When you send a check-out request to the master file cabinet, your request may be rejected. For example, if the binder you requested is already checked out to someone else, or if the binder has been deleted from the master file cabinet, your request is rejected.

If your request is rejected, the Rejection Conflicts view (in the file cabinet Administration navigator) displays a list of all conflict and rejection documents. An example is illustrated below.
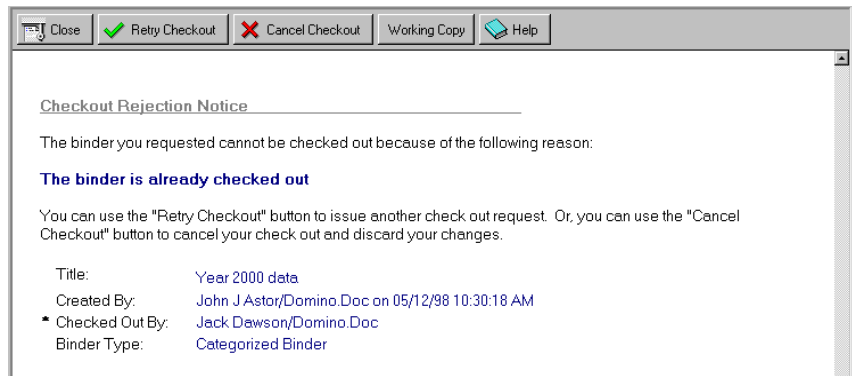
Select the rejection document for your binder check-out and do one of the following:

- Click Retry Checkout to resubmit the request which keeps the provisional lock on the binder and maintains your changes.
- Click Cancel Checkout to cancel the request and discard your changes.

Resolving binder check-out conflicts

If you send a check-out request to the master file replica and the binder you requested is currently available, but has been modified since you sent the request, the binder is checked out to you, but you must resolve any differences between your working copy and the master binder before you can check it back in.

The Checkout Conflict Notice, illustrated below, displays which binder attributes were modified (Binder Profile, Binder Security). You can also access a table of some of the key fields in your working copy and the master copy; click View Your Copy or View Your Master Copy respectively.
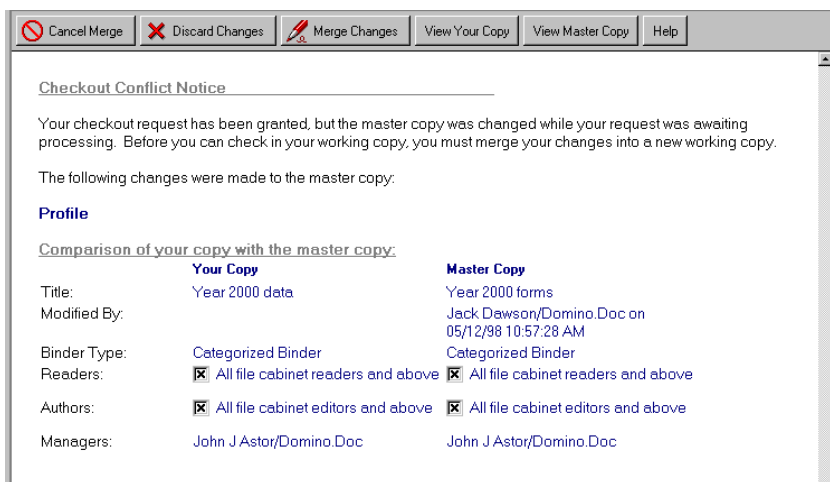
To resolve binder check-out conflicts, determine which copy is correct — your working copy or the master binder — and do one of the following:

- Click Discard Changes to disregard your changes during check-in.
- Click Merge Changes to selectively incorporate your changes into the master binder during check-in.

Domino.Doc will redisplay the Checkout Conflict Notice and present you with Conflict resolution options for profile conflicts and security conflicts.

- Choose "Keep your changes" if your changes to this attribute are more current.
- Choose "Discard your changes" if the master binder attributes are correct. Even if you did not change an attribute, choose the Discard option to ensure that your working copy does not overwrite the master binder during check-in.

About checking in a binder

A checked-out binder remains locked and unavailable to others until it is checked back in. If you are working in the master file cabinet, checking a binder in is straightforward.

If you are not working in the master file cabinet, before checking in a binder, you must:

- Receive a check-out lock from the master file cabinet.
- Check the binder back in from the same server from which you requested the check-out.
- Resolve any check-out conflicts.

Binders must be checked in on the same server from which they were checked out.

Chapter 5
Working with Documents

This chapter describes what you need to know when working with documents in Domino.Doc, including:

- About creating documents
- Adding documents to Domino.Doc
- About document types
- About document security
- About document versioning
- About document life cycle management
  - About the document review cycle
  - About the document approval cycle
  - About archiving documents
- Finding and opening documents
  - Searching for documents
  - About favorite documents
  - About recently edited documents
- About checking out a document
- About checking in a document
- About forwarding documents
- About deleting documents
- About moving, copying, and bookmarking documents
- About discussing documents in the Forum
- About using Sametime integration for document collaboration

About creating documents

With Domino.Doc library you can create document content from your favorite authoring tool (including integrated applications and Lotus Notes) and then save that content directly into the library. You can also initiate document creation from within Domino.Doc, on the Web, in Notes, or on your desktop.

When you save your documents into the library, you'll provide a storage location — file cabinet and binder — and you'll choose a document profile from a predefined list of document types. If the document type has a set of fields (attributes), you can enter field values to make your document easier to organize and locate.

You can also create documents from any file cabinet replica. However, when you create a document from a non-master file cabinet replica, the binder activity log is not updated immediately. An "activity log" transaction is sent to the master file cabinet replica, and the activity log is updated there.

Adding documents to Domino.Doc

Domino.Doc provides many ways for you to add existing documents to its libraries.

You can add a document directly into a Domino.Doc file cabinet by using an integrated application to create or modify a document, and then save it into the designated library.

When you begin working with Domino.Doc, you'll have existing documents that you'll want to capture. You can capture existing files into your Domino.Doc library by:

- Uploading existing files with a browser
- Uploading existing files with Notes
- Importing files with Notes
- Capturing existing Notes documents
- Dragging and dropping files with Windows Explorer
- Adding new documents with Windows Explorer

About document types

Document types let you file documents with more than just basic title information, making it easier to find the document later. For each document type, appropriate extended attributes can be specified. For example, a document type called "Proposal" could have these attributes: Company Name, Project, Budget, and Responsible Group. A document type called "Correspondence" could have attributes called To, From, Subject, and Date.

Also, for each document type, options can be specified for document versioning, review, approval, archiving, retrieval, and workflow.

When Domino.Doc was set up and configured for your site, your System Administrator defined all of the document types for the entire library. When the file cabinets were created, the document types allowed to be stored there were specified. Thus, when you save a new document and specify its cabinet location, you select a type from a given list and enter the specific attribute values.

About document security

When a file cabinet is created, the file cabinet creator specifies who can read and edit the documents that will be stored in the file cabinet, and specifies default document security.

If the default security specified on the file cabinet is "Inherit Binder Security," the list of Editors will default from the binder for new documents. The author can change the access on a per-document basis.

If the default access control specified on the binder is "Limit access to creator," the author can add names to the editor lists on a per-document basis, provided these names are included in the binder user lists. Document access can only be given for users who also have access to the file cabinet specified for those documents.

Document users

Every document has a user list that defines who can access it and what tasks those users can perform. The document user list is limited to the binder user list, but the document manager can change access on a per document basis.

The document user list defines the following users:

Readers These users can view the document; they cannot change document content or properties or move, or remove the document.

All users who have at least Reader access to the binder that contains the document are automatically given Reader access to the document. The list of document Readers cannot be modified.

Editors These users can view and edit document content, properties, and profile information.

A user must have at least Editor access to the binder that contains the document in order to be a document Manager. All Managers of the binder containing the document are automatically given Editor access to the document.

Draft Editors These users can view and edit drafts of a versioned document.

Managers These users can modify the document security, move or copy the document to a different binder, or delete the document. A user must have at least Editor access to the binder that contains the document in order to be a document Manager.

You can set document security when creating a new document, or let it default to the binder user list. You can view a document's security settings from any of the Domino.Doc user interfaces. You can change document security settings only if you have Manager access to the document and have it checked out.

About document versioning

Domino.Doc provides two levels of document versioning: drafts and versions. You can save documents as drafts throughout the authoring and editing cycles. When the final draft has been approved and is ready to be published, you can save it as a version.

- Versions have round number designations, for example: 1, 2, 3.

- Drafts have a round number and a decimal fraction, showing the relationship to the version; for example, 1.1, 1.2, 1.3.

- For a new document that has not yet been saved as a version, the drafts will appear with a zero, for example: 0.1, 0.2, 0.3, etc.

- A new document that has not yet been checked in at all will appear as 0.0.

Draft documents are useful for collaborative projects in which several people will be contributing content. For example, let's say that you are the Product Manager responsible for developing the Domino.Doc White Paper. You'll draft the white paper and the development manager will add technical content, and the editor will make stylistic changes. Your white paper

will go through several iterations, or drafts, before becoming a final, published document that you'll save as a "version." When the product is scheduled for another release, you can check out the previously released version, update it, save the edited version as a draft, and thus start the cycle all over.

The versioning in this case would look something like this:

DDWP	0.1	your initial Domino.Doc White Paper draft
DDWP	0.2	the development manager's technical content additions
DDWP	0.3	the editor's changes
DDWP	0.4	the review draft
DDWP	0.5	the final changes draft
DDWP	1.0	your published Domino.Doc White Paper
DDWP	1.1	your new release initial draft

The access to drafts, or works in process, can be different from the access to published versions. While the draft editors are working on a new document or are revising an existing document, other users will see only what has been previously published, not what is in process.

Only the latest copy of a document can be checked out for editing. If a version has a draft based on it, only the draft can be checked out. The check-in options depend on whether the checked-out document is a draft or version, and whether or not drafts are enabled for the document type. For documents like memos that are created in a single editing session and do not need to be collaborated on, reviewed, and approved by others, drafts are not necessary.

When a version (1.0) is checked out, a working copy is created. The working copy can be checked in as either a new version or a draft. If it is checked in as a new version (2.0), the editor can choose to replace or maintain the previous version (1.0). If the document is checked in as a draft, the current version is still the original version (1.0) and the working copy becomes a draft (1.1).

Drafts provide an electronic history of the evolution of the document. If you do not need to keep such a record, you can choose to "delete all drafts" when you save the document as a version. For example, if you are checking in draft 1.5 as version 2.0, you can delete drafts 1.1 through 1.5 if you'd like.

About document life cycle management

Many business documents progress through a series of stages that collectively form the document's life cycle. These stages include Authoring, Review, Approval, Release, and Archiving. As a document cycles through its life, the related activity (like editing and reading) trends downward. Eventually a document is no longer needed for regular and instant access and can be archived to less costly media for occasional usage or simply for policy compliance.

Review, approval, and archiving options can be enabled (or disabled) and parameters can be defaulted on the document type form.

Document Authoring Facilitates the creation and initial editing of a document by one or more editors.

Document Review Routes a draft document to a set of users for review. The reviewers may edit document content, add a comment to the document, or both. Typically, the results of a document review are used to update the original document. Depending on how the review cycle was set up, the reviewers may update the document themselves, or the author may update the document from the reviewers' comments.

Document Approval Routes a draft document to a set of users for approval or rejection. Documents must be approved for many reasons. Policy documents may need approval prior to being distributed to a broad audience. Expense reports may need approval prior to the disbursement of funds. The common factor is that one or more users must approve or reject a document prior to the document moving to subsequent stages. During the approval cycle, no changes or comments are made to the document's content. Approvers are allowed to attach comments, however.

Document Release Marks the document complete, meaning that it has finished its editing life cycle. The properties of the released version of the document will probably be different from that of the draft version. For example, the security, or ACL, that is used during authoring and review probably limits access to a small number of users, whereas the ACL given to the final version may be a more wide-ranging thus allowing greater access to the document.

Document Archiving Involves storing an out-of-date document in an alternate repository (for example, the file system, a relational database, or an optical disk).

Document States Describe the specific point of a document's life. They are as follows:

- **New** — This is a document before it is checked in for the first time.
- **Draft** — The document is being edited by one or more editors and has not been released.
- **In Review** — The document is being reviewed by one or more reviewers.
- **Review Complete** — The current draft has gone through a review cycle.
- **Pending Approval** —The current draft is in the approval process.
- **Approved** — The current draft has been approved but not checked in as a version.
- **Rejected** — The current draft has been rejected during the approval process.
- **Released** — The document has been checked in as a version.

About the document review cycle

Many collaborative documents should be reviewed, commented on, and edited by a team of people prior to general publication of the document.

Any current document draft can be submitted for review by any draft editor providing drafts are not disabled for the document type, and a review cycle is set up. When the last reviewer finishes the review, the initiator is notified and the document state is changed to "Review Complete." The initiator can change the reviewer list and cancel the review cycle at any time prior to review completion.

About the document approval cycle

Many business documents require an approval before they can be released or finalized. Policy documents, for example, may need several approvals prior to being generally distributed; expense reports may need approval prior to the disbursement of funds. In an approval cycle, one or more editors must approve or reject a document before anything else happens to it. If the document requires a review cycle, the review must be complete before the approval cycle can begin.

Any current document draft can be submitted for approval by any draft editor providing drafts are not disabled for the document type, and an approval cycle has been set up.

If any approver rejects the document, (for example, more information may be needed or the document may need to be changed), the approval cycle ends.

About archiving documents

When a document has progressed through its life cycle and is no longer needed for regular and instant access, you can archive the document's content to an external storage facility where it can be easily recalled. Archiving large, "out of date" documents frees space for your current Domino.Doc documents.

System Administrators can configure Domino.Doc to use different mechanisms for archiving and retrieving. For example, they can:

- Run agents to archive and retrieve documents on a file system.

- Use the Domino.Doc Storage Manager™ (DDSM) add-in to archive and retrieve documents on a Tivoli® Storage Manager (TSM) server.

- Run agents to archive and retrieve Domino.Doc data on an AS/400® system.

Archiving options

When adding a document type to a library, the System Administrator specifies archiving options that control when and how documents are archived. For example, documents can be manually archived if the "Allow manual archiving" option is set to "Yes" on the document type form. Otherwise, documents can be automatically marked for archiving by the "Mark for Archive" agent, based on criteria entered in the document type definition.

Note   Changes to archiving options apply only to new documents that are created using the updated document type. Archive option settings associated with an existing document cannot be modified, even if the document is modified.

Archiving guidelines

- Documents can be archived from the master file cabinet replica only.

- If a document is checked out, the current document (version or draft) cannot be archived.

- Working copies cannot be archived.

- If drafts are deleted, any review copies associated with the draft will also be deleted.

- You cannot mark the latest version for archive if that version has a checked-out draft, or if the draft is in a review or approval cycle.

Using this example of versions and drafts:

Ver. **Draft**

2.1

2.0

1.2

1.1

1.0

0.3

0.2

0.1

Draft 2.1 will not be archived because it is not associated with a version.

When 2.0 is archived, drafts 1.2 and 1.1 will either be archived or deleted, depending on the draft options settings on the document type form.

When 1.0 is archived, drafts 0.3, 0.2, and 0.1 will be either archived, left alone, or deleted, depending on the draft options settings on the document type form.

For more information on archiving options, see the *Domino.Doc Administrator's Guide*.

Finding and opening documents

While you can find documents by going to a file cabinet, opening its binders and examining the contents list, you will probably more often want to find a document more directly.

Domino.Doc provides several ways to find and open documents stored in its libraries that are available after you have worked with your documents for awhile. As the result of your activities in the library, you will develop collections of documents, including:

Search Results — list of documents that satisfy the search criteria

Favorites — list of documents that you have designated as favorites

Recently Edited (History) - list of last five documents (and binders) that you have accessed and modified, in this library

Life Cycle — list of documents you have access to that are in the review or approval process

Checked Out — list of documents that you have checked out

Note If you are an Administrator, the Recently Edited, Life Cycle, and Checked Out lists show all of these items for all users.

Searching for documents

You can perform searches from any of the user interfaces. Domino.Doc provides powerful capabilities for searching, offering both simple and advanced searches. In a simple search, you provide a text string, or words, to search for. In an advanced search you set up parameters to be used to refine the search. You can direct Domino.Doc to search the entire library, or limit the search to designated file cabinets. You can save your search queries for later reuse, or delete them.

When the search is completed, you are presented with a list of the documents that met the criteria. You can then select any of those documents to work on - open, edit, check out, delete, move, and so forth.

About favorite documents

When working in Domino.Doc, you can create "favorite" documents (and binders) for quick access directly from the library.

If the favorites list contains the document you are seeking you can open it directly by selecting it in the list.

You can access the favorites list, add items to it, and remove items from it using all of the Domino.Doc interfaces.

The favorite document link is associated with the current version of a document; you cannot associate a favorite with a previous version or draft, or with a working copy.

When you access a favorites view in the Domino.Doc library, you see only your own favorites. Administrators who use the Notes client can see all favorites categorized by the users who created them; however, when using the Windows Explorer or browser, administrators see only their own favorites.

Note A document that has been deleted may still appear in the list.

About recently edited documents

Domino.Doc retains a list of the last five documents that you have modified.

You can view recently edited lists from any Domino.Doc user interface. If the list contains the document you are seeking you can open it directly by selecting it in the list.

When you access a recently edited list in the Domino.Doc library, you see only your own documents. Administrators who use the Notes client can see all recently edited items in the list; however, when using the Windows Explorer or browser, administrators see only their own recently edited documents.

Note A document that has been deleted may still appear in the list.

About checking out a document

The Domino.Doc check-in and check-out features help ensure document integrity. Based on document security, any author or editor can check out a document. When this happens, Domino.Doc releases the document to the user and prevents other users from checking out the same document until that document has been checked back in. (Other users can still view the document while it is checked out, they just can't modify it.) This assures that users are viewing and making decisions on the most current released information instead of a work in process.

You can check documents out of the Domino.Doc library through any of the Domino.Doc user interfaces.

Documents that are in a review or approval cycle, however, cannot be checked out.

Note You can check out a new document immediately using File - Import, an exception to usual check-out functionality. When you make an edit request on a document, a check-out request is transparently initiated.

When you try to check out a document, several things can happen depending on how your System Administrator configured the file cabinet replica, and whether or not you are working in the master file cabinet.

If you are working in the master file cabinet, or if you can connect to it you can check out the document immediately. This locks the document so that other editors cannot modify it, and it creates a working copy of the document for editing.

If you are *not* working in the master file cabinet:

- Check-outs may not be allowed from your file cabinet replica. You'll be able to open the document for viewing, but you won't be able to check it out for editing.

- You may have the option of sending a check-out request to the master file cabinet. This gives you a provisional lock on the document, and a working copy for editing. When your check-out request arrives at the master file cabinet, one of three things will happen:

  - If the document is not currently checked out, and it has not been modified by someone else since you obtained the provisional lock, the document is checked out to you (locked) and you can continue to make changes, or you can check it back in.

  - If the document is currently checked out to someone else, if it has been moved to a different binder, or if it has been deleted, your check-out request is rejected. You can cancel the request and discard your changes, or you can retry the request which maintains your changes and keeps the binder provisionally locked.

  - If the document is not currently checked out but has been modified since you requested the lock, it is checked out to you, but you must resolve any differences between your working copy and the master before you can check it back in. You can choose to discard your changes and check the document back in, or you can selectively merge your changes into the master document before checking it in.

- You may be prompted for how you want to proceed, with the choice being to send a check-out request to the master file cabinet, or connect to the file cabinet and check out the document immediately.

If you are editing the document in an integrated application and you want to continue editing during another session, do not check the document back in after saving your changes. If you save the document to your local file system (for example, if you want to take a local copy home to continue working on it), you'll have to check it back in through your browser or Notes when you are finished editing.

If you are working with the Domino.Doc library from the Windows Explorer interface, you can use the Attache Case to store a checked out document for working offline.

About checking in a document

Documents that have been checked out need to be checked back in so that changes get recorded and the document is unlocked and available to other users. Documents must be checked in on the same server from where they were checked out.

If you are working in the master file cabinet, checking a document in is straightforward.

If you are not working in the master file cabinet, before checking in the document, you must:

- Receive a check-out lock from the master file cabinet.
- Check the document back into the same file cabinet from which you checked it out.
- Resolve any check-out conflicts.

You can check in documents from any of the Domino.Doc user interfaces.

Whenever you check in a document, you must specify whether to check it in as a draft or a version, or unchanged, and specify the check-in options for your choice:

Checking in a document as a version

- Choose "Version" to maintain the previous draft or version and create a new version that includes your changes.
- Choose "Version - replace current version" to replace the previous version with your changed version. This option also deletes the drafts on which the prior version was based.
- Check "Delete drafts" if drafts are associated with the version and you do not need to keep them as document history.

    Note   If a review cycle is required for the document, it cannot be checked in as a version or submitted for approval until the review has been completed. If an approval cycle is required for the document, it cannot be checked in as a version until the document has been marked approved.

Checking in a document as a draft

- Choose "Draft" to maintain the previous draft and create a new draft that includes your changes.
- Choose "Draft - replace current draft" to replace the previous draft with your changed document.

Checking in a document as it was

- Choose "Discard changes" if you do not want to record your changes.

Note   Not all of these options are always available. It depends on what was specified when the file cabinet was created and the state of the document.

About forwarding documents

The document forward feature allows you to send other users e-mail that includes a document's contents, links to the documents, or both. You can forward documents from the binder view or from the document profile. You can forward documents from Notes or a Web browser.

For more information see "Forwarding a document from Notes" in Chapter 6, "Working with Domino.Doc from the Notes Client," or "Forwarding a document from a browser" in Chapter 7, "Working with Domino.Doc from a Browser."

About deleting documents

You can delete documents from the Domino.Doc library if you have the correct access to them. When working from a browser, you must first open the profile and then delete the document.

Domino.Doc gives you several options when deleting documents, to take into account Domino.Doc document versioning and life cycle management.

Deleting documents from Domino.Doc impacts related versions and drafts of that document. Depending on the state of the document, you must select one of the following options when deleting a document:

- Delete the current draft
- Delete all drafts of the current version
- Delete the current version
- Delete all versions
- Delete a review draft

The following relationships apply:

- If you delete the latest document version, all drafts based on that version are also deleted.

  For example, if you delete version 2.0, with associated drafts 2.1, 2.2, and 2.3, these drafts will be deleted also.

- If you delete the latest document draft, you can optionally delete the previous drafts of the same document.

  For example, if draft 2.5 is the latest draft, you can choose to delete drafts 2.1 through 2.4 also.

- If you choose to delete a current version or draft (the one that is available to be checked out) and a previous version or draft exists, the previous document becomes the current document.

For example, if you have a document that has two versions: 1.0 (with drafts 0.1, 0.2, 0.3) and 2.0 (with drafts 1.1, 1.2, and 1.3) and you delete version 2.0, Version 1.0 becomes the current document. If you then delete version 1.0, draft 0.3 becomes the current document.

About moving, copying, and bookmarking documents

Existing documents in the Domino.Doc library can be moved or copied from one binder to another. For example, you can make a copy of a document if you'd like it to serve as the basis for a similar document. You can also make a virtual copy of a document in another binder by creating a document bookmark in the other binder. You can bookmark the document in as many binders as you want.

These options are not supported in all the Domino.Doc interfaces.

The following rules apply:

Moving a document to another binder (from all Domino.Doc interfaces)
- In order to move the document, you must have Manager access to the document.
- You must have Editor access to both the current binder and the one where you want to put the document.
- The document cannot be moved if it is checked out by another user.
- The document security will be updated to that of the new binder.
- To avoid replication conflicts, Domino.Doc allows you to move a document to a different binder in the master file cabinet only.
- You can move only the latest document, or the latest working copy (the current draft, or the current version if there are no drafts).

Copying a document to another binder (from Notes)
- You can copy a document to another binder within the same file cabinet or to a binder within a different file cabinet.
- You must have access to the new binder and file cabinet.
- You must have Editor access to the document.
- You must have Editor access to the current binder and/or file cabinet as well as the one you want to copy the document to.
- The destination binder and file cabinet must allow the type of document being copied.
- If the binder you want to copy is checked out, the new copy will not be checked out.

- If the document is in a review or approval cycle, the new copy will not be in the review or approval cycle; review copies and comments will not be copied.

- The document security for the new copy will be based on the security of the new binder.

- If the document type subform contains fields with computed values that are dependent on the original file cabinet and/or binder, these values will not be recalculated automatically when the document is copied. You must check out the document and make any required profile field changes before copying it.

Bookmarking a document (from all Domino.Doc interfaces)

- A bookmark is a pointer, or link, to an existing document.

- You can place a bookmark for an existing document in as many binders as you'd like within the same file cabinet.

- When you click on a bookmark, you open the original document, providing it has not been deleted or the document access has not been changed.

- A periodic background agent, "Refresh Bookmarks," ensures that if the original document changes, the bookmark will get updated.

About discussing documents in the Forum

The Forum feature allows users to create discussion topics and responses for Domino.Doc documents. Available from both the Notes and Web clients, the thread of topics and responses is related to and accessible from any version or draft of a Domino.Doc document. As long as at least one version of the document exists, the entire discussion thread is maintained.

Basic features

- Forums are based on the standard Notes main topic\response\response to response hierarchy.

- Forums can be created and read by document Managers, Authors, and Readers.

- All aspects of the feature are available from both Notes and Web clients.

- The discussion thread (all topics and responses) is available from any version or draft of a document.

- The Forum is accessed from a link in a document profile that displays the current discussion documents.

Administration and Security

- New main topic documents that are created from within the discussion thread inherit security settings from the latest version or draft of a document that the author can see.

- New main topic documents that are created directly from a version or draft, inherit that document's security settings.

- Response documents always inherit security from the parent document.

- A document manager can delete all or delete selected discussion documents.

- Deleting all versions of a document forces deletion of all related discussion documents, but as long as at least one version of a document remains, all discussion documents will remain.

Other principles

- Discussion documents are stored in the same database as the Domino.Doc document. They are moved accordingly if the document or its binder is moved.

- Discussion documents are non-editable.

- The unique Document Number, common to all versions and drafts, is included on every main topic and response. For reference, when each main topic or response is created, the title and version number of the latest document version is stored and displayed.

- Discussion documents do not support file attachments.

About using Sametime integration for document collaboration

If you have a Sametime server installed on the same domain as Domino.Doc, and Sametime Integration enabled for your library, you can use this feature for collaborating on a document, as an alternative to creating a Forum to discuss a document, or in conjunction with it. The document must be in a file cabinet that also has Sametime Integration enabled.

This feature is available from the Notes client or Web interfaces only.

When you have a document open, you can use the Who is Online option to open a floating Sametime window to communicate with other Sametime users who have access to the document and are online.

Chapter 6
Working with Domino.Doc from the Notes Client

This chapter describes how the user navigates the Domino.Doc library from the Notes client, and how to use the Notes client interface to find and manage the contents of the file cabinets.

- About working with Domino.Doc from the Notes client
  - Navigating the Domino.Doc workspace from Notes
  - Working in the library from Notes
  - Working in a file cabinet from Notes
  - Searching from Notes
  - Using favorites from Notes
- Working with a binder from Notes
  - Creating a binder
  - Checking out a binder from the master file cabinet
  - Checking out a binder from a non-master file cabinet
  - Changing a binder profile
  - Changing binder security
  - Checking in a binder
  - Copying a binder
  - Deleting a binder
- Working with a document from Notes
  - Importing files in Notes
  - Adding an existing document to Domino.Doc from Notes
  - Adding a new document to Domino.Doc from Notes
  - Capturing existing Notes documents
  - Opening a document from Notes
  - Checking out a document from the master file cabinet from Notes
  - Checking out a document from a non-master file cabinet from Notes
  - Editing a document from Notes
  - Changing a document profile from Notes

- Changing document security from Notes
- Checking in a document from Notes
- Creating a document version from a checked-in draft
- Forwarding a document from Notes
- Moving a document to a different binder
- Copying a document to a different binder
- Bookmarking a document
- Deleting documents
- Submitting a document for review
- Submitting a document for approval
- Manually archiving a document from Notes

- Using Who is Online
- Using the Discussion Forum

About working with Domino.Doc from the Notes client

When working with Domino.Doc from the Notes client you can perform a wide variety of activites to manage the organization and contents of the library. This section contains a general description of how to navigate from the Notes client windows, and describes all the actions and views you may encounter based on the current object - the Library, a File Cabinet, a Binder, or a Document.

Navigating the Domino.Doc workspace from Notes

What you can do and see while working in Domino.Doc from the Notes client depends on your role and user access level. Navigation options also vary according to the current object of the library hierarchy - the Library, a File Cabinet, a Binder, or a Document.

General
- Not all action buttons and list items are always displayed.

- The Escape key returns you to the previous view.

- You use the menu bar, or icons in the action bar, to select actions for the current object.

- While items and actions are usually selected by left-clicking, you right-click to access options in a binder if the current file cabinet uses Notes folders for the Table of Contents.

Note   If you are working with a low-resolution display (such as 800x600), you may be unable to see the action icons at the far righthand side of the bar. Choose Actions from the menu bar for access to all actions.

Navigation pane

A navigation pane displays along the left side of the Domino.Doc library and file cabinet workspace. The pane contains two sections:

- **Action** — These buttons allow you to select allowable activities, and to access Domino.Doc Help.

- **View** — These buttons allow you select views related to the current activity. Library always takes you back to the entry point.

Workspace Icons and Tabs

Icons representing the elements of the Domino.Doc hierarchy display at the top of your workspace to show you where you are in the hierarchy of your library. You can navigate by clicking on the appropriate icon as long as you are not in the process of creating, editing, or saving any information. Clicking on the Library icon always takes you back to the library entry point.

Tabs allow you to see lists and forms related to the current activity, such as Profile, Security, Revision History, Activity Log, Who is Online, or Lotus Workflow.

Logo

The Domino.Doc logo displays on the upper-left area of the navigation pane in the Library view. Click on the logo to see the Domino.Doc About box for the product version and copyright information.

An animated icon appears in the logo when you save new file cabinets, binders, or documents, or perform a search. This icon is a visual cue that Domino.Doc is processing your action.

Working in the library from Notes

The library contains all existing file rooms, and the file cabinets contained in them. When you want to work with a library-wide view of documents, binders, or file cabinets, you use the main library view.

What you can do and what you will see on the views, depends on your role and access level; only Administrators can perform all actions and see everything in the views.

Library Actions and Views

Click this button:	To do this:
New File Cabinet	Access the form for creating a new file cabinet. (Administrator only)
Connect File Cabinet	Add a new file cabinet to the library by attaching an existing one. (Administrator only)
Search	Search file cabinets using either a simple search based on specified words, or an advanced search based on specified words, plus creation or modification date; an advanced search can include binders, documents, or both. **Note** You can search on as many file cabinets as you are allowed to access.
Help	Access the Domino.Doc Help topics.
File Cabinets	Display a list of existing file rooms and the file cabinets they contain.
Checked Out	Display a list of the binders and documents that you have checked out for editing; or, if you are an Administrator, display a list of all binders and documents that are checked out.
Favorites	Display a list of your favorite binders and documents; or, if you are an Administrator, display a list of all favorites categorized by user.
Life Cycle Status	Display the list of documents you can access, categorized by life cycle status, or, if you are an Administrator, display a list of all documents by life cycle status.
Recently Edited	Display a list of your five most recently edited documents, or all recently edited if you are an Administrator.
Library Administration	Access the Administration tasks (described under Library administration actions and views below).

Library Administration

The following set of options is accessed by clicking the Library Administration button from Actions in the library navigation pane. All administrative tasks must be performed from the Notes client. Refer to the *Domino.Doc Administrator's Guide* for more information. Users who are not Domino.Doc Administrators can use only the view options in this navigator. While all buttons will appear for all users, if you choose an action you cannot perform, a message will notify you that you cannot perform that action.

Library Administration Actions and Views

Click this button:	To do this:
Create Binder Type	Access the form for specifying a new binder type. (A subform must have been added to the File Cabinet Template for this type).
Create Document Type	Access the form for specifying a new document type. (A subform must have been added to the File Cabinet Template for this type).
Create Launch Associations	Access the form for associating file formats, extensions, and IDs with ODMA applications you will be using with Domino.Doc. (This is an Administrator function).
Download Client Software	Download the Domino.Doc Desktop Enabler software to enable launching ODMA-enabled applications and the Windows Explorer interface (Domino.Doc Neighborhood).
System Profile	Access the form for setting and changing the system-wide attributes for Domino.Doc and for restricting access to the Public Name and Address Book. (This is an Administrator function). **Note** This function can be performed in the master library replica only.
Delete	Delete the selected Binder Types, Document Types, Groups, or Launch Associations. (This is an Administrator function).
File Cabinets	View the list of file cabinets that you can access.
Document Types	View the list of document types defined for the library.
Binder Types	View the list of binder types defined for the library.
Launch Associations	View the list of ODMA application file formats defined for use with Domino.Doc.
Library	Return to the main library view.
Log	View the list of errors and events reported by Domino.Doc.
Replication	Access the Replication tasks (described under Replication actions and views below).

Replication actions and views

This set of options is accessed by clicking the Replication button from the Library Administration view.

Click this button:	To do this:
New Replica	Access the form for creating a new replica of the Domino.Doc Library. (This is an Administrator function.) **Note** This function can be performed in the master library only.
Change Master Library	Choose a different server for the master library. (This is an Administrator function.)
Verify Replica Integrity	Run an integrity check on the list of servers and generate a report of any inconsistencies. (This is an Administrator function.)
Replicas	View the list of replicas that exist for the master library.
Location Info	View server-specific information for each file cabinet replica, including the name, directory path, and whether or not the replica is the master.
Navigation Info	View server-specific information for each file cabinet replica, including the name and server to access when opening the file cabinet.
Administration	Return to the Administration actions and views.
Library	Return to the library.
Transactions	Access the Transaction database actions and views.

Transaction database

This set of options is accessed by clicking the Replication button from the Library Administration view, then clicking Transactions.

Click this button:	To do this:
All Transactions	View the list of all Domino.Doc transaction events: replica creation and deletion, binder and document check-out requests.
Pending Transactions	View the list of pending transactions.
Failed Transactions	View the list of failed transactions. System Administrators can retry processing these transactions.

Working in a file cabinet from Notes

When you open a file cabinet from the library, you see all the binders contained in the file cabinet. You can:

- Create a new document or binder
- Check out a binder
- Add a binder to your favorites list
- Delete a binder
- Aearch for a binder or document

Several views are provided to help you locate your binders and documents.

If you have elected to keep your documents in multiple databases, a new document database will be created when your document database reaches one of the thresholds you specified. This new database becomes the "current" document database and, therefore, the database associated with new binders that you create. A document that is added to the new binder will be stored in the current database; a document added to a previously existing binder will be stored in the original database.

What you can do and what you will see on the views, depends on your role and access level; only Administrators can perform all actions and see everything in the views.

File cabinet actions and views

Click this button:	To do this:
New Document	Display the New Document form for creating a new document.
New Binder	Display the New Binder form for creating a new binder.
Check Out Binders	Check out one or more selected binders.
Add to Favorites	Add a selected binder to your favorites list for easy access.
Delete	Delete a binder or multiple binders if you are in a binder storage database; delete a document or multiple documents if you are in a document storage database.
Search	Display the search dialog box for performing a simple search based on a list of words and specified constraints and sorting criteria, or an advanced search dialog for performing a search based on specific words and dates and on specified constraints and sorting criteria. **Note** The search is limited to this file cabinet (including the binder storage database and all associated document storage databases).

Click this button:	To do this:
Getting Started	Display the Getting Started information to learn about the Domino.Doc basics. Install the Desktop Enabler.
Edit File Cabinet	Access the File Cabinet form for changing general information, version control, security information, or access control. **Note** Any user can access this form, but only authorized users can edit it.
Help	Display the Domino.Doc Help topics.
Import Files	Access the Domino.Doc File Import Utility form for capturing a group of documents.
Binders by Title	Display the binders that exist in the selected file cabinet arranged by title.
Binders by Author	Display the binders that exist in the selected file cabinet arranged by author.
Binders by Type	Display the binders that exist in the selected file cabinet arranged by type.
Documents by Title	Display the documents contained in the selected file cabinet (in the first document storage database) arranged by title.
Next Binder Set	Display the binders that were created for documents contained in the next document storage database. **Note** This will not display if all documents are stored in a single database.
Previous Binder Set	Display the binders that were created for documents contained in the previous document storage database. **Note** This will not display if all documents are stored in a single database.
Custom Views	Display a list of user-defined binder and document views.
Library	Return to the library.
File Cabinet Administration	Access the Administration tasks (described under File Cabinet Administration below).
Replication Conflicts	Display a list of binder and document check-out conflicts.

File Cabinet Administration Actions and Views

The file cabinet administration actions are all Administrator-only tasks. The binder views are available to users with appropriate access. While all buttons appear for all users, if you choose an action you cannot perform, a message will notify you that you cannot perform that action. Refer to the *Domino.Doc Administrator's Guide* for more information.

This set of options is accessed by clicking the File Cabinet Administration button from the file cabinet.

Click this:	To do this:
Change Home Library	Change the home library for the selected file cabinet replica. (This is an Administrator function.)
Change Master Server	Change the master library server for the selected file cabinet replica.(This is an Administrator function.) **Note** The master library server can be changed in the master file cabinet replica only.
Verify Replica Integrity	Run an integrity check on the list of servers and generate a report of any inconsistencies. (This is an Administrator function.)
Change Check-Out Options	Access the form for changing binder and document check-outs for the selected file cabinet. (This is an Administrator function.)
Full-Text Indexing	Access the form for changing the full-text indexing options for the selected file cabinet. (This is an Administrator function.)
Binder Administration	Perform an action on the Table of Contents folders for binders in the file cabinet, including forcing creation of folders, deleting orphaned folders, rebuilding all folders, and rebuilding folders for selected binders. (This is an Administrator function.)
Binders by Title	Display the binders that exist in the selected file cabinet arranged by title.
Binders by Author	Display the binders that exist in the selected file cabinet arranged by author.
Binders by Type	Display the binders that exist in the selected file cabinet arranged by type.

Searching from Notes

Domino.Doc has a powerful search capability that allows you to search for documents across multiple file rooms and file cabinets.

While working in Notes, you can perform two types of search:

- Simple search

  For more information, see "Performing a simple search from Notes" later in this chapter.

- Advanced search

  For more information, see "Performing an advanced search from Notes" later in this chapter.

You can also save the search criteria or "query" so that if you need to perform the search again, you don't have to re-enter complex definitions. Instead, you can open the query and initiate the search. You can modify the query if you'd like, as well as delete the query when you no longer need it.

Notes uses certain syntax rules for a search query.

For more information, see "Notes query syntax tips" later in this chapter.

Performing a simple search from Notes

Domino.Doc allows you to perform a simple search on a word or multiple words to help you locate the documents you have access to. You can be general in your search if you don't know or can't recall anything specific, or you can refine the search to specific file cabinets, binder, and document types. You can also specify how you want to view the results, and you can limit the number of matches that display.

Note To search multiple file cabinets, you need to be in the library; searching within a file cabinet limits your search to that file cabinet.

Procedure

To perform a simple search, perform the following steps:

1. From the Domino.Doc library, click Search, then click Simple Search.

2. Specify the file cabinets to search: all that you can access, or selected file cabinets.

   If you choose selected file cabinets, select the ones to search.

3. Complete the Search by Word information.

   • In the Search for the following word(s) box, enter a word or words to search for (the document name, for example).

4. (Optional) Specify Search Constraints and Sorting criteria to narrow your search.

   • Specify what to search: documents and binders (the default), documents, or binders.

   • Choose specific types of documents and/or binders to search (otherwise, all types will be searched).

   • Specify how you want to view the search results: by relevance or by oldest first.

   • Specify the number of matches you want to view. The default, 0, will display all found results.

5. (Optional) Save your search criteria for later use by doing the following:

   - Click Save Query or Save Query As.

   - Enter a search query name.

   - Click OK.

6. Click Start Search to initiate the search.

   The results of the search display with links to the profiles of the found documents.

Performing an advanced search from Notes

Advanced search allows you to refine your search by specifying a list of words and a specific date for the document you are trying to locate. There is also a forms search option, available if the file cabinet creator customized the template to include SearchByForm as a custom subform.

Note To search multiple file cabinets, you need to be in the library; searching within a file cabinet limits your search to that file cabinet.

Procedure

To perform an advanced search, perform the following steps:

1. From the Domino.Doc library, click Search, then click Advanced Search.

2. Specify the file cabinets to search: all that you can access, or selected file cabinets.

   If you choose selected file cabinets, select the ones to search.

3. Complete the Search by Word information by doing one of the following:

   - Choose "Search for any of the following words," or "Search for all of the following words," specify the words you want to search for, and optionally check the "Find exact word matches only" box (full text indexing must have been specified for the file cabinet).

   - Choose the "Search by form" option, if forms are available, to select the appropriate form, then enter the field information you want to search for, separating multiple values with a comma.

4. Complete the Search By Date information:

   - Specify whether to search for documents that were created or modified on, after or before a specific date (the date format is dependent on geographic location).

5. (Optional) Complete the Search Constraints to narrow your search."

    - Specify what to search: documents and binders (the default), documents, or binders.

    - Choose specific types of documents and/or binders to search for (otherwise, all types will be searched).

    - Specify the number of matches you want to view. The default, 0, will display all found results.

6. (Optional) Save your search criteria for later use by doing the following:

    - Click Save Query or Save Query As.

    - Enter a search query name.

    - Click OK.

7. Click Start Search to initiate the search.

    The search results display with links to the profiles of the found documents.

Performing a search on specific fields in a form

Using field operators

Field operators allow you to restrict your search to specific fields in a form.

Operator and synonym:	Result (selected documents...):
[field_name] operator	contain the query expression in the specified field
FIELD [field_name] operator	contain the field name in the specified field

The types of operators you can use depends on the type of field:

Type of field:	Operator you can use:
Text	contains
Rich Text	contains
Number	= (equals) > (greater than) >= (greater than or equal to) < (less than) <= (less than or equal to)
Date	all the operators listed for Number field

Using expressions with field operators
Expressions used with field operators must be enclosed in parentheses.

Query:	Result (selects documents...):
field categories contains "tax law"	where "tax law" appears in the categories field
[subject] contains (cat or mouse)	where "cat" or "mouse" (or both) appear in the subject field
[total]>=100	where the number in the total field is greater than or equal to 100
[ComposedDate]>3-20-93	Those documents that were composed after 3-20-93

Reusing search queries from Notes
When you perform a search from Notes, you can save the search criteria for later use.

Procedure
To reuse a search query you've previously saved, perform the following steps:

1. From the Domino.Doc Library, click Search.

2. Click Open Query.

    Your list of saved search queries displays.

3. Select the query you want to use.

    The query information appears in the search form.

4. Do one of the following:

    - Click Simple Search or Advanced Search, then click Start Search to perform a search based on the query information.
    - Modify and save the search criteria.

Deleting search queries from Notes
When you perform a search you can save the search criteria or query for later use. You are limited, though, in the number of search queries you can have in your list. Therefore, when you no longer need a query, you should delete it.

Procedure
To delete a search query, perform the following steps.

1. From the Domino.Doc library, Click Search.

2. Click Open Query.

    Your list of saved queries displays.

3. Select the query you want to delete, and click OK.

    The query information appears in the search form.

4. Click Delete Query.

Notes query syntax tips

Use the following syntax rules when performing a search query. Use parentheses to override precedence and to group operations.

- Plain text — To search for a word or phrase, enter the word or phrase as is, except that search keywords and symbols must be enclosed in quotes. It's better to enclose all search text in quotes. Remember to use double-quotes if you are inside a LotusScript literal.

- Wildcards — Use ? to match any single character in any position in a word. Use * to match zero-to-many characters in any position in a word.

- Hyphenated words — Use hyphenated words to find two-word pairs that are hyphenated, run together as a single word, or separated with a space.

- Logical operators — Use logical operators to expand or restrict your search. The operators and their precedence are **not** (!), **and** (&), **accrue** (,), and **or** (|). You can use either the keyword or symbol.

- Proximity operators — Use proximity operators to search for words that are close to each other. These operators require word, sentence, and paragraph breaks in a full-text index. The operators are **near**, **sentence**, and **paragraph**.

- Field operator — Use the field operator to restrict your search to a specified field. The syntax is **FIELD field-name operator**, where **operator** is **contains** for text and rich text fields, and is one of the following for number and date fields: **=, >,** or **<**. You cannot use the operators **>=** and **<=**. You can, however, use **>, <**, and **=** separately with the **or** operator to represent the **>=** and **<=** operators.

- Exactcase operator — Use the **exactcase** operator to restrict a search for the next expression to the specified case.

- Termweight operator — Use the **termweight n** operator to adjust the relevance ranking of the expression that follows, where **n** is 0-100.

Using favorites from Notes

You can access binders and documents quickly by creating and using a favorites list.

You can add one or more binders and documents to the Favorites list from any binder view, or the Documents by Title view where a button is provided in the toolbar.

You can access a document or binder from the list, or delete items from the list using the Library view where a Favorites button is provided on the Action bar.

For more information, see "About favorite documents" in Chapter 5, "Working with Documents."

Procedures

To access your list of favorite binders and documents, click Favorites in the Actions bar of the library view and select the item you want to work with.

Adding items to the favorites list

To add binders and/or documents to your favorites list, perform the following steps:

1. Do one of the following:

    - Select the binder(s) or document(s) you want to add and click Add to Favorites.

    - Open a binder or document you want to add and click Add to Favorites.

2. At the prompt, "Do you wish to add the selected item(s) to your Favorites list?" click Yes.

Removing items from the favorites list

To remove binders or documents from your favorites list, perform the following steps:

1. From the Domino.Doc library, click Favorites.

2. Select the binder(s) and/or document(s) you want to remove, and do one of the following:

    - To delete immediately, hit the Delete key, choose Edit - Cut, or right-click and select Cut.

    - To mark for deletion, choose Edit - Clear, or right-click and select Clear.

3. At the prompt, "Do you really want to delete?" click Yes.

Working with a binder from Notes

When you open a binder, you see a list of the documents contained in the binder. You can:

- Access the binder profile, security, and a report of binder activity

- Select a document and view the content

- Create a new document
- Check out one or more selected documents
- Delete one or more selected documents
- Copy the binder and all of the documents in it to a different file cabinet
- Add a binder to your list of favorites
- Create a discussion topic for a document

How you perform these actions varies slightly, depending on the option selected for the Binder Table of Contents for the file cabinet:

- BinderTOC ActiveX control
- Notes folders

When you click on Binder Profile, a graphical representation of the storage system hierarchy displays at the top of your workspace so that you always know where you are. You can return to the file cabinet or library by clicking on the appropriate icon as long as you are not in the process of creating, editing, or saving any information.

If you select a working copy and multiple working copies exist, you will be given more information about each copy and asked to select the one you want.

If you have access, you can check out the binder in order to edit the profile or security.

The icon for a binder varies, depending on whether it is locked (checked out) or provisionally locked (a check-out request has been sent to the master file cabinet).

The icon for a checked-out binder has a lock, and the icon for the working copy has a pencil. If there are multiple working copies, the icon shows two binders and the text beside the icon states that "Multiple Work-In-Progress binders exist."

The icon for a provisionally locked binder has a lock and a question mark, and the icon for the working copy has a pencil and a question mark.

When copying a binder, or editing a binder profile, you may be prompted by Domino.Doc to change the name of the binder if it finds another binder with the same name. You can accept the duplicate name, or make a name change.

Note Actions on a binder are available based on your role and access level; only Administrators can perform all of these actions.

Open binder actions - BinderTOC ActiveX control

The following actions are available from the action bar on a binder that has been opened.

Click this button:	To do this:
Close Binder	Close the binder.
Binder Profile	Display the Binder Profile information.
Copy Binder	Create a copy of this binder and all its documents in another file cabinet.
Add Binder to Favorites	Add the binder to your favorites list.
New Document	Access the New Document form for creating a new document in the current binder.
Refresh	Redisplay the view after you have made changes.

To perform the following additional actions click your right mouse button to display a menu.

Select this option:	To do this:
Document Profile	Open the document profile.
Edit	Open the selected document for editing if you have it checked out. If it is not checked out, it will be checked out transparently and opened for editing.
View	Open the selected document for viewing.
Check Out	Check out the selected document for editing or for changing the document profile or security information.
Go to Working Copy	Open the working copy of the selected checked out document.
Go to Latest	Access the document profile form of the current draft associated with the selected document version.
Go To Review Copy	Access the profile form of the working copy of the selected checked out document.
Revision History	Access a report of the selected document's activity.
Discussion Forum	Access the discussion thread for a document. If there are no discussion documents, you can create one.
Delete Documents	Delete selected documents. **Note** This function can be performed in the master file cabinet replica only.
Add Documents to Favorites	Add the selected documents to your favorites list for easy access.
Mark Documents for Archive	Display the Mark for Archive dialog box to specify archiving options for selected documents.
Forward Documents	E-mail the selected documents to another user.

Checked-out binder actions - BinderTOC ActiveX control

When you check out a binder, a lock appears beside it and its status changes to Read Only, protecting it from editing by other users. A working copy is created for you to edit the binder profile or security information.

Actions for the checked-out binder are available only to you (except for Check-In, an activity that can be done by the Administrator also).

You can select the same actions as listed above for an opened binder except that Check Out is not available. To check the binder in, click Binder Profile and choose Check-In.

Checked-out binder tabs - BinderTOC ActiveX control

When you access the binder profile on a checked-out binder, you see two tabbed folders.

Click this tab:	To do this:
Binder Profile	View the binder title, type, and field attribute values.
Security	Display the user lists for the binder.

Open binder actions - Notes folders

The following actions are available from the action bar on a binder that has been opened.

Click this button:	To do this:
Close Binder	Close the binder.
Binder Profile	Display the Binder Profile information.
Edit	Open the selected document for editing if you have it checked out. If it is not checked out, it will be checked out transparently and opened for editing.
View	Open the selected document for viewing.
Check Out Documents	Check out the selected document for editing or for changing the document's profile or security information.
Delete Documents	Delete the selected documents. **Note** This function can be performed in the master file cabinet replica only.
Forward	E-mail the selected document to another user.

The following additional actions are available from the drop-down menu when you choose Actions from the menu bar when viewing an opened binder.

Select this option:	To do this:
Add Documents to Favorites	Add the selected document(s) to your favorites list for easy access.
Add Binder to Favorites	Add the binder to your favorites list.
Copy Binder	Create a copy of this binder and all its documents in another file cabinet.
Mark for Archive	Display the Mark for Archive dialog box to specify archiving options for selected documents.

Checked-out binder actions - Notes folders

Check out the binder in order to perform the following actions. When you check out a binder, a lock appears beside it and it changes to Read Only so other users can access it for viewing. A working copy is created for you to edit the binder profile or security information. The checked-out binder actions are available only to you (except for Check-In, an activity that can be done by the Administrator also).

The following actions are available from the drop-down menu when you choose Actions from the menu bar when viewing a checked-out binder.

Click this:	To do this:
Close Binder	Close the binder.
New Document	Display the new document form for creating a new document.
Edit Profile	Access the binder profile form for changing profile and security information. **Note** Binder profile information can only be changed on the server from which check-out occurred.
Check In	Check the binder in, release the lock, and make it available to other editors.
Add to Favorites	Add the binder to your favorites list for easy access.
Refresh	Redisplay the view after you have made changes.
Activity Log	Display a report of the binder processing activity.

The following additional actions are available from the drop-down menu when you choose Actions from the menu bar when viewing a checked-out binder.

Select this option:	To do this:
Table of Contents	Display the Binder Table of Contents.
Copy Binder	Create a copy of this binder and all its documents in a file cabinet to which you have access.

Binder Table of Contents actions - Notes folders
If you have checked out a binder, you can open the working copy and access its Table of Contents view by choosing Actions - Table of Contents. This view provides additional information about the binder.

The following actions are available from the action bar on a binder Table of Contents view.

Click this:	To do this:
Close Binder	Close the binder.
Binder Profile	Access the binder profile form for changing profile and security information.
	Note Binder profile and security information can only be changed on the server where the check-out occurred.
Edit	Open a selected document for editing if it is checked out. If it is not checked out, it will be checked out transparently and opened for editing.
View	Open a selected document for viewing.
New Document	Display the New Document form for creating a new document.
Check Out Documents	Check the binder out for changing the binder profile information or security.
Delete Documents	Delete the selected documents.
	Note This function can be performed in the master file cabinet replica only.
Forward	E-mail the selected documents to another user.

The following additional actions are available from the drop-down menu when you choose Actions from the menu bar, when viewing the binder Table of Contents.

Select this option:	To do this:
Add Documents to Favorites	Add the selected documents to your favorites list.
Add Binder to Favorites	Add the selected binder to your favorites list.
Copy Binder	Create a copy of the selected binder and all its documents in another file cabinet.
Mark for Archive	Display the Mark for Archive dialog box to specify archiving options for a selected document or documents.
Unmark for Archive	Cancel the archive request for the document.

Checked-out binder tabs - Notes folders

When you access the binder profile on a checked-out binder, you see two tabbed folders.

Click this tab:	To do this:
Binder Profile	View the binder title, type, and field attribute values.
Security	Display the user lists for the binder.

Creating a binder

You can create a binder in a file cabinet to hold your documents.

The new binder will be added to all replicas of this file cabinet when replication occurs.

When creating a binder you may be prompted by Domino.Doc to change the name of the binder, if it finds another binder with the same name. You can accept the duplicate name, or make a name change.

Note If the file cabinet profile specifies Notes folders for the binder Table of Contents, and if you are not an Administrator, the Table of Contents for the binder may not get created immediately.

Procedure

To create a new binder, perform the following steps:

1. From the Domino.Doc library, open the file cabinet that will hold the binder you are creating.
2. Click New Binder.

3. Complete the following information:

- Enter the binder title.
- Select a different binder type if necessary.

   An Index Card of the fields that have been defined for this type of binder displays.

4. Enter the attribute values that are appropriate for your new binder.

5. (Optional) Change Reader, Editor, and Manager access rights for this binder.

6. Click Save when you've completed all of the binder information.

For more information on setting access rights, see "About binder security" in Chapter 4, "Working with Binders."

Checking out a binder from the master file cabinet

You must check out a Domino.Doc binder if you want to change its profile, or its security settings. Checking out a binder locks it so that other editors cannot modify it, and it creates a working copy of the binder.

Procedure
To check out a binder, perform the following steps:

1. Open the Domino.Doc library.

2. Open the master file cabinet that contains the binder you want to change.

3. Select the binder (or binders) you want to change.

4. Click Check Out Binders to check the binder (or binders) out for editing.

5. Change the necessary profile or security information.

6. Click Check In to save your changes and check the binder back into the file cabinet.

Checking out a binder from a non-master file cabinet

You must check out a Domino.Doc binder if you want to change its profile, or its security settings. Checking out a binder locks it so that other editors cannot modify it, and it creates a working copy of the binder.

If you are working in the non-master file cabinet, you can check out a binder in one of two ways, depending on how the file cabinet replica was configured:

- You can connect to the master server, if it is accessible to you.
- You can send a check-out request to the master file cabinet.

You must edit and check in the binder on the same server from where you checked it out.
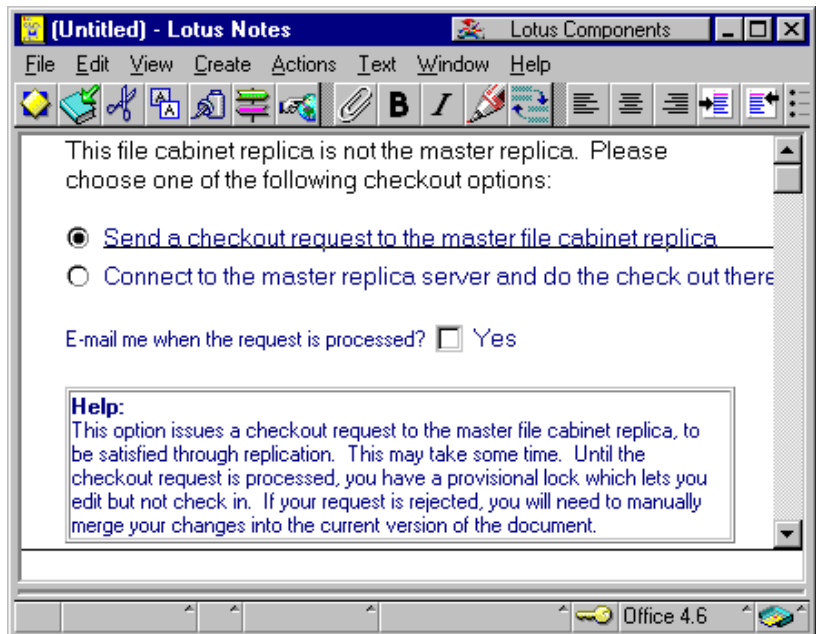
Procedure

To check out a binder when you are not working in the master file cabinet, perform the following steps:

1. Open the Domino.Doc library.

2. Open the file cabinet that contains the binder (or binders) you want to change.

3. Select the binder (or binders) you want to change.

   What happens next depends on how the file cabinet replica was configured. One of the following will occur:

   - The binder opens for viewing only because it cannot be checked out for editing from this replica.

   - A check-out request is sent to the master file cabinet and you receive a provisional lock on the binder and a working copy for editing, but you won't be able to check the binder back in until the check-out request is processed. Continue with step 6.

   - The binder is immediately checked out of the master file cabinet and you receive a lock and a working copy for editing. Continue with step 6.

   - The Check Out Options dialog box, illustrated below, displays.

4. Choose one of the following check-out options:

- **Send a check-out request to the master file cabinet replica** This option sends a check-out request to the master file cabinet replica, grants you a provisional lock on the binder, and gives you a working copy for editing.

- **Connect to the master replica server and do the check-out there** This option opens the master file cabinet replica if it is accessible over the network. The document is immediately checked out on the master replica, and a working copy is replicated to your file cabinet replicas.

5. If you'd like to receive an e-mail notification when the request is processed, check "Yes" beside the option "E-mail me when the request is processed?"

6. Change the profile and/or security information.

   Note Click Return to Library if you want to change the profile or security information later.

7. When you have finished making changes to the binder, click Check In to save your changes and check the binder back into the file cabinet.

   Note If you made changes to a working copy before your check-out request was processed, you'll have to wait until you receive the lock to check it back in. If the binder is currently checked out to someone else, or has been deleted from the master file cabinet, your request will be rejected. If someone else made changes to the binder before you received the lock, you'll have to resolve the conflicts.

Changing a binder profile

When you create a new binder in Domino.Doc, you'll provide a Binder Title and you'll choose a Binder Type from a pre-defined list. If the Binder Type has a set of fields (attributes), you can enter field values to further organize your documents. Depending on your access rights, you can change this profile information later, if you need to.

Your changes will be applied to all replicas of this file cabinet when replication occurs.

When creating a binder you may be prompted by Domino.Doc to change the name of the binder, if it finds another binder with the same name. You can accept the duplicate name, or make a name change.

Note If you are working in a non-master file cabinet, you must access the binder for editing from the same server where you requested the check-out.

Procedure

To change profile information for your binder, perform the following steps:

1. Check out the binder you want to change.
2. Open the working copy.
3. Click Binder Profile.
4. Click Edit Profile.
5. Change the necessary information.
6. Click Check In to save your changes and check the binder back into the Domino.Doc library.
7. Specify whether to save or discard changes.
8. (Optional) Enter a comment or a description of your changes.
9. Click OK.

Changing binder security

Binder security defaults from the file cabinet level. All File Cabinet Readers and Editors are automatically given access to the binders contained in the file cabinet. If you have Manager access, you can change the access levels on a per binder basis. If binder security has been turned off for the file cabinet, the list of binder readers and editors cannot be changed.

When you change binder security, the security of all documents in the binder will be updated to reflect your changes when the binder is checked in. Specifically, if you remove a user from the binder access list, that user will be removed from the access list of all documents in the binder. Similarly, if a user is added to the binder access list, that user will be added to the access list of every document in the binder. If a document is checked out when the binder is checked in, the security for that document will be updated when it is checked back in.

Note If you are working in a non-master file cabinet, you must access the binder for editing from the same server where you requested the check-out.

Procedure

To change the access levels for a binder, perform the following steps:

1. Check out the binder you want to change.
2. Open the working copy.
3. Click Binder Profile.
4. Click Edit Security.
5. Click the check box "All file cabinet readers (or editors) and above" to de-select the defaulted list.

6. Click Add/Remove to display the current user list for the binder.

7. Do one of the following:

   - Select a group, then click Add Group (or Remove).
   - Select a person (or persons), then click Add (or Remove).

8. Click OK.

9. Click Check In to save your changes and check the binder back into the Domino.Doc library.

10. Specify whether to save or discard changes.

11. (Optional) Enter a comment or a description of your changes.

12. Click OK.

Checking in a binder

You can check in a binder from either a master or a non-master library. After checking in a binder from a non-master file cabinet, the binder cannot be checked out again until the check-in has replicated to the master file cabinet.

Procedure

To check in a binder, perform the following steps:

1. From the Domino.Doc library, click Checked-Out.

2. Open the binder you want to check in.

   The working copy opens and the Binder Profile displays.

3. Click Check In to check the binder back in.

4. Indicate whether you want to "Save changes" or "Discard changes."

5. (Optional) Enter a description of your changes.

6. Click OK.

Copying a binder

You can copy a binder and its contents to another file cabinet. Copying a binder creates a new binder in the specified file cabinet. You can specify whether you want to copy all the documents, or only the latest of each version or draft.

The newly created binder will have the default binder type of the target file cabinet.

When creating a binder you will be prompted by Domino.Doc to change the name of the binder, if it finds another binder with the same name. You can accept the duplicate name, or make a name change.

Note Copying binders can be done only from the Notes client.

Access is managed as follows:

- The person who copies the binder obtains Manager access to the new binder.
- Other access is set based on the default settings for new binders in the target file cabinet.
- You must have at least Editor access to the target file cabinet.
- You must have author access to each document that you want to copy, whether it is a version or a draft. Inaccessible documents are not copied.

Procedure

To copy a binder to another file cabinet, perform the following steps:

1. From the binder table of contents view, Choose Actions - Copy Binder.

   The Binder dialog displays.

2. Choose whether to copy the latest document version or all document versions.

   Note   For each version copied, all drafts based on that version will also be copied.

3. Choose the file cabinet you want to create the copy in.

4. Click OK.

5. Enter a title for the new binder, then click OK.

Deleting a binder

If you have the proper user access, you can delete binders that do not contain any documents. You can delete binders from any file cabinet replica, but in order to prevent replication conflicts, you must first check out a binder before you delete it from a non-master replica. You do not need to check out binders to delete them from the master replica.

Note   If you are working in a non-master file cabinet, the binder can be deleted only from the file cabinet from which you requested the check-out. The binder will be deleted from all replicas of this file cabinet when replication occurs.

Procedure

To delete a binder, perform the following steps:

1. From the Domino.Doc library, open the file cabinet that contains the binder you want to delete.

2. Select the binder, or binders, you want to delete.

3. Click Delete.

4. When asked if you are sure that you want to delete the binder permanently from the file cabinet, Click OK.

   If the binder contains any documents, you will receive a message informing you that the binder cannot be deleted unless it is empty.

Working with a document from Notes

When working with Domino.Doc in Notes you can work with a document directly, or through its profile, obtaining access to it from the table of contents of the binder. The view of the table of contents, and the way you perform actions on them, is determined by the binder Table of Contents option specified for the file cabinet. Follow the instructions according to the binder type in use in the current file cabinet:

- Document actions - BinderTOC ActiveX control
- Document actions - Notes folders

When you open a document, a graphical representation of the storage system hierarchy displays at the top of your workspace so that you always know where you are. You can return to the binder, the file cabinet, or the library by clicking on the appropriate icon as long as you are not in the process of creating, editing, or saving any information.

If you click on a working copy and multiple working copies exist, you will be given more information about each copy and asked to select the one you want.

The icon for a document varies, depending on whether it is locked (checked out) or provisionally locked (a check-out request has been sent to the master file cabinet).

The icon for a checked-out document has a lock, and the working copy has a pencil. If there are multiple working copies, the icon shows two documents and the text beside the icon states that "Multiple Work-In Progress documents exist."

The icon for a provisionally locked document has a lock and a question mark, and the icon for the working copy has a pencil and a question mark.

Note Document actions are available based on your role and access level. You may not see, or be able to use, all the options described here.

Document tabs
When you access the document profile, you see three or more tabbed folders.

Click this tab:	To do this:
Document Profile	View the document title, creator, type, and field attribute values; you may also see who has checked out the document, the check-out server, the check-out status, and the current version of the document.
Security	Display the user lists for the document.
Revision History	View the number of revisions, the dates and times of the revisions, the editors, and the comments for this document.
Who Is Online	To use the Sametime integration feature. (Only if enabled for the owning file cabinet and library).
Workflow	To access Workflow information. (Only if this is a Workflow document).

If the document is part of a discussion forum, a Go to Forum link is also present on the profile.

Document actions - BinderTOC ActiveX control
To perform the following actions, open the binder, select the document (or documents), then click your right mouse button to display the menu.

Select this option:	To do this:
Refresh	Display the view again to include changes you have made.
Document Profile	Access the document profile form for viewing profile, security, and revision history information, and for changing the document status from draft to version.
Edit	Open the document for editing. Checks it out if you do not have it checked out.
View	Open the document for viewing only.
Check Out	Check the document out for editing or for changing the document profile or security information.
Go to Working Copy	Open the working copy of the selected checked out document.
Go to Latest	Access the document profile form of the current draft associated with the selected document version.
Go To Review Copy	Open the review copy for editing.
Revision History	Display a report of the document processing activity.
Delete Documents	Delete the selected documents from the binder. **Note** This function can be performed in the master file cabinet replica only.
Add Documents to Favorites	Add a selected document to your favorites list for easy access. (This function is accessed from the Actions menu.)

continued

Select this option:	To do this:
Mark Documents for Archive	Display the Mark for Archive dialog box to specify archiving options for a selected document or documents.
Forward	E-mail the document to another user.
Discussion Forum	Access the discussion forum for this document.

If review and approval options are specified, and drafts are not disabled for the type of document, you can perform submit a document to one of these processes. These are accessed at the top righthand side of the graphical representation of the Domino.Doc hierarchy, where you can click on

- Submit for Review
- Submit for Approval

Document actions - Notes folders
In the Notes folders view, you initially access a document through its profile. To perform document actions, open the binder and double-click on the document to open the document profile.

From the document profile, you can display the security, revision history, and a report of document activity. You can link the document to different binders for easy access. If the document is part of a discussion forum, a Go to Forum link is also present on the profile.

If you have the appropriate access, you can:

- copy or move the document to a different binder
- delete the document
- check the document out for editing the content, the profile, and the security information
- check the document back in and, based on document type, set up, submit, complete, and cancel review and approval cycles

The following actions are available from the action bar on a document that has been opened.

Click this button:	To do this:
Close	Close the document.
View	Open the document for viewing.
Create Version	Change the document status from draft to version.
Check Out Document	Check the document out for editing or for changing the document profile or security information.

continued

Click this button:	To do this:
Refresh	Redisplay the view after you have made changes.
Activity Log	Display a report of the document processing activity.
Forward	E-mail the document to another user.
Move to Binder	Select a different binder for this document. **Note** This function can be performed in the master file cabinet only.
Delete	Delete the document from the binder. **Note** This function can be performed in the master file cabinet only.
Go to Forum	Access the discussion forum for this document.

The following additional actions are available from the drop-down menu when you choose Actions from the menu bar.

Select this option:	To do this:
Copy to File Cabinet	Create a copy of this document in another file cabinet to which you have access.
Add to Favorites	Add a selected document to your favorites list for easy access.
Copy Bookmark to Binder	Create a bookmark to this document in a binder to which you have access.
Create Forum Topic	Add this document to a discussion forum, or add a new topic to a document that is already part of a discussion forum.

Document review and approval actions - Notes folders
If review and approval options are specified, and drafts are not disabled for the type of document, you can perform the following actions for a document.

Click this:	To do this:
Submit for Review	Access the Setup Review dialog box in order to enter or change review cycle information, and initiate a review cycle for this document.
Open Review Copy	Open the review copy of the document for editing or for commenting.
Delete Review Documents	Delete all review comments and review copies associated with the draft after the review has been completed and the edits incorporated. (This can be done by the review initiator only.)
Complete Review	Mark the review complete and ready for approval.
Cancel Review	Cancel the review cycle for this document.

Click this:	To do this:
Submit for Approval	Access the Select Approvers dialog box in order to enter or change approval cycle information, and initiate an approval cycle for this document.
Approve	Approve this document and, if you are the last approver, mark the approval cycle complete.
Reject	Reject this document and cancel the approval cycle.
Cancel Approval	Cancel the approval cycle for this document.

Document archiving actions - Notes folders

If the document type allows for manually archiving out-of-date documents to an external storage facility for easy retrieval, you can perform the following actions, depending on your role and access level.

For more information, see "About Domino.Doc roles" in Chapter 1, "Introducing Domino.Doc."

Click this:	To do this:
Mark for Archive	Display the Mark for Archive dialog to specify archiving options for the document.
Unmark for Archive	Cancel the archive request for the document. (This function is accessed from the Actions menu.)
Reattach Archived File	Manually attach a file to the archived document, if for some reason you can no longer retrieve the archived document. (This function is accessed from the Actions menu.)

Checked-out document actions - Notes folders

When you check out a document, a lock appears beside it and it changes to Read Only so other users can access it for viewing only. A working copy is created for you to edit the document content, profile, or security information. Actions on documents that are checked out are available only to you (except for Check In, an activity that can be done by the Administrator also).

The following actions are available from the action bar on a document that has been checked out.

Click this:	To do this:
Close	Close the document.
Edit Document	Launch the application associated with the document and open it for editing. If the document is not currently checked out, it will be checked out transparently and opened for editing. **Note** A document can be changed only on the server where the check-out occurred.
Edit Profile	Access the document profile form for changing profile information. **Note** Document profile information can be changed only on the server where the check-out occurred.
Edit Security	Access the document security form for changing the security. **Note** Document security can be changed only on the server where the check-out occurred.
Check In	Check the document into the library, release the lock, and make it available to other editors.
Refresh	Display the view again to include changes you have made.
Activity Log	Display a report of the document processing activity.
Forward	E-mail the document to another user.
Move to Binder	Select a different binder for this document. **Note** This function can be performed only in the master file cabinet replica.

The following additional actions are available from the drop-down menu when you choose Actions from the menu bar.

Select this option:	To do this:
Copy to File Cabinet	Create a copy of this document in another binder. **Note** The new binder can be in the same file cabinet or in a different file cabinet.
Add to Favorites	Add the document to your favorites list.
Delete	Delete a selected binder. **Note** This function can be performed only in the master file cabinet replica.
Create Forum Topic	Add this document to a discussion forum, or add a new topic to a document that is already part of a discussion forum.

Importing files in Notes

If you are just getting started with Domino.Doc, you probably have many documents you'd like to capture. The File Import feature, available through Notes, allows you to import a group of documents at one time; for example, an entire directory. Depending on the number of documents and their content, the import can take several minutes, so you will want to plan accordingly.

Procedure

To capture documents this way, perform the following steps:

1. From the Domino.Doc library, open the file cabinet for the documents.

   Note If necessary, you can create a new binder for the document you are uploading.

2. Click Import Files on the action bar.

   The Domino.Doc File Import Utility form displays.

3. Enter the following file location information:

   File Source Specify whether to import the files from a list of file names, or from a text file containing a list of names. The contents of the text file must be one file name per line, with the name being the full path name.

   Directory If you are importing files from a directory, enter the path and name of the directory.

   File specification Enter the names of the files you want to import. Entering *.* will import every file in the directory; *.*extension* will import all files of that type in the directory. For example, use *.lwp to import all Lotus Word Pro files.

   If you are using a list of file names, you must provide the fully-qualified path.

4. Enter the following Characteristics of Imported Documents:

   Description Text that describes the documents you are importing. After you finish importing, you can see the description when you view each document's profile.

   Document type The document type defaults. Select a different document type if necessary. If you want to change the field attribute values for this document type, click the Edit Document Profile button.

Destination binder The binder defaults from the file cabinet. If you want to change the binder for these documents, click the Select Binder button and select a different binder.

Note To avoid replication conflicts, the binder activity log is not updated immediately when you import files on a non-master file cabinet replica. An "activity log" transaction is sent to the master file cabinet replica, and the activity log is updated there.

New document status Indicate whether you want to check in the documents as drafts, versions, or you want to leave them checked out after importing them.

Delete files after import? Indicate whether or not you want to delete the files from your local drive after importing them into Domino.Doc.

5. (Optional) Click the Preview button to see how many files will be imported.

6. Click Import Documents.

Adding an existing document to Domino.Doc from Notes

A Domino.Doc document can contain simple textual information or a single file attachment in any file format. You must be in a rich text field in order to enter information and attach a file.

In order to make an existing document available in your Domino.Doc file cabinet, you need to create a new document within Domino.Doc by defining and profiling the document, and attaching the existing file.

Procedure
To add a document to Domino.Doc, perform the following steps:

1. From the Domino.Doc library, open the file cabinet for this document.

   Note If necessary, you can create a new binder for the document you are uploading.

2. Click New Document.

3. Enter a title for the document.

4. Select a binder for this document (if you do not specify a binder, the document will automatically be saved to the Default binder).

5. Enter a description for the document.

6. Click Attach File.

   The Create Attachments dialog box displays.

7. Do one of the following:

   - Select the file's drive and directory and then select the file.

   - Enter the path and file name in the File name box.

   Note To avoid unexpected results, do not specify more than one file attachment.

8. Click Create.

   The file attachment appears in the Document Content field.

9. Select a document type from the drop-down list. The field attributes that have been defined for this document display.

   Tip Select - No Type - if you do not require field attributes for this document.

10. Enter the attribute values for this document.

11. Examine the default access, and change the access for this document if necessary.

12. Click Save.

13. Choose an option from the Check-in options displayed.

14. (Optional) Enter a comment.

15. Click OK to check in the document.

Adding a new document to Domino.Doc from Notes

You can create a new Domino.Doc document by either typing the text or attaching an existing file. In either case, you must use a rich text field to contain the text or file attachment.

Procedure

To add a new document by typing the text:

1. From the Domino.Doc library, open the file cabinet where you want to add the new document.

   Note If necessary, you can create a binder for the document.

2. Click New Document.

3. Enter a title for the document.

4. Select a binder for this document (if you do not specify a binder, the document will automatically be saved to the Default binder).

5. Enter the document content.

6. Enter a description for the document.

7. Select a document type from the drop-down list. The field attributes that have been defined for this document display.

    Tip   Select - No Type - if you do not require field attributes for the document.

8. Enter the attribute values for the document.

9. Examine the default access, and change the access for the document if necessary.

10. Click Save and then click Close.

11. Choose an option from the Check-in options displayed.

12. (Optional) Enter a comment.

13. Click OK to check in the document.

Capturing existing Notes documents

If your Notes client has been set up to save documents to Domino.Doc, you can save Notes documents (such as e-mail messages) directly in the Domino.Doc library. What will actually be stored in Domino.Doc is a static snapshot of the document text; fields, formulas, or actions will not be captured.

For more information, refer to the *Domino.Doc Administrator's Guide*.

Opening a document from Notes

You can open a document for viewing, or for editing. (If you have Reader access, for viewing only).

Procedure

To open documents stored in Domino.Doc from the Notes client, perform the following steps:

1. If you have recently accessed the document, go to the main library view and click on the Recently Edited button. Select the document you want to edit by double-clicking.

    When the Document Profile tab displays, use the tool bar, or Actions from the menu bar, to open the document:

    - Click View to view the document.
    - Click Edit Document to check out and edit the document.
    - Click Check Out Document to check out the document.

2. If the document is not in the Recently Edited list, from the Domino.Doc library, open the file cabinet and then the binder that contains the document you want to open.

   Note You can search for your document if you don't know where it is stored, and view or edit it from the search results.

   Tip If you are storing your documents in multiple databases based on storage thresholds, you can click on the Documents by Title tab and navigate between binder sets (document storage databases) using the Next Binder Set and Previous Binder Set buttons.

3. If your binder Table of Contents design uses the BinderTOC ActiveX control, right-click on the document and select View, Edit, or Check out.

4. If your binder Table of Contents design uses Notes folders, access the profile of the document you want to open by double-clicking on its entry in the list of documents in the binder.

Note A lock appears beside the document in the list if it is checked out. You won't be able to view or edit it until it is available to be checked out again. To make it available, click Check In.

Checking out a document from the master file cabinet from Notes
A document stored in Domino.Doc must be checked out for editing, moving, editing its profile, or editing its security. Checking out a document locks it so that other editors cannot modify the document, and it retrieves a working copy of the document for editing. When you choose Edit or Edit Document, the document is automatically checked out.

Procedure
To check out a document from the master file cabinet, perform the following steps:

1. From the Domino.Doc library, expand the appropriate file room and open the master file cabinet, and then the binder that contains the document you want to check out.

   Note You can search for the document if you don't know where it is stored.

2. Click in the left-most column beside each document you want to check out.

3. Click Check Out Document.

4. Open the working copy.

5. Do one of the following:

   - Click Edit Document to launch the application associated with the document and open it for editing.

   - Click Edit Profile to change the document title, type, or field attribute values.

   - Click Edit Security to change the Document Editor, Reader, Editor, or Manager list for this document, providing you have access.

   - Click Move to Binder to move the document to a different binder.

   - Click Return to Library if you want to edit the document later.

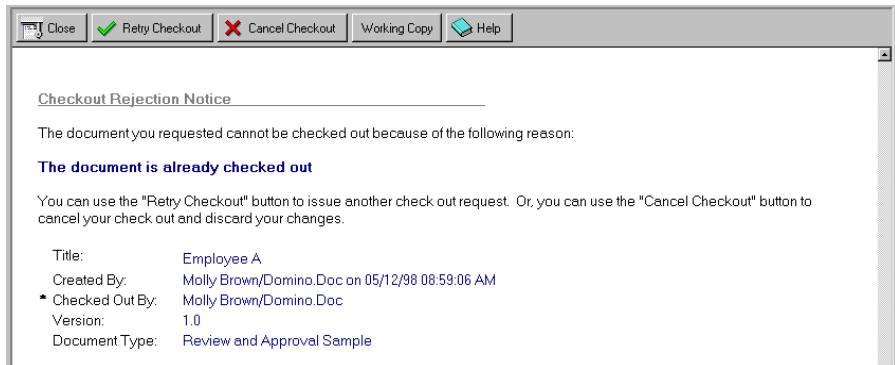6. When you have finished making your changes, check the document back in.

For more information, see "Checking in a document from Notes" later in this chapter.

Checking out a document from a non-master file cabinet from Notes
A document stored in Domino.Doc must be checked out for editing. A document can only be checked out from the master file cabinet. If you are not working in the master file cabinet, you can connect to it if the server is accessible to you, or you can send a check-out request to the master file cabinet, depending on how the replica was configured. You must edit and check in the document on the same server from which you checked it out.

Procedure
To check out a document when you are not working in the master file cabinet, perform the following steps:

1. From the Domino.Doc library, open the file cabinet and then the binder that contains the document you want to check out.

2. Click in the left-most column beside each document you want to check out.

3. Do one of the following:

   - Click your right mouse button, select Document Profile, then click Check Out Documents if your binder Table of Contents design is using BinderTOC ActiveX control.

   - Click Check Out Documents if your binder Table of Contents design is using the Notes folders.

   What happens next depends on how the file cabinet replica was configured. One of the following will occur:

   - The document is immediately checked out of the master file cabinet and you receive a lock and a working copy for editing. Continue with step 5.

- A check-out request is sent to the master file cabinet and you receive a provisional lock on the document and a working copy for editing, but you won't be able to check the document back in until the check-out request is processed. Continue with step 5.

- An error message is generated because the document cannot be checked out for editing from this replica.

- The Check Out Options dialog box, illustrated below, displays.
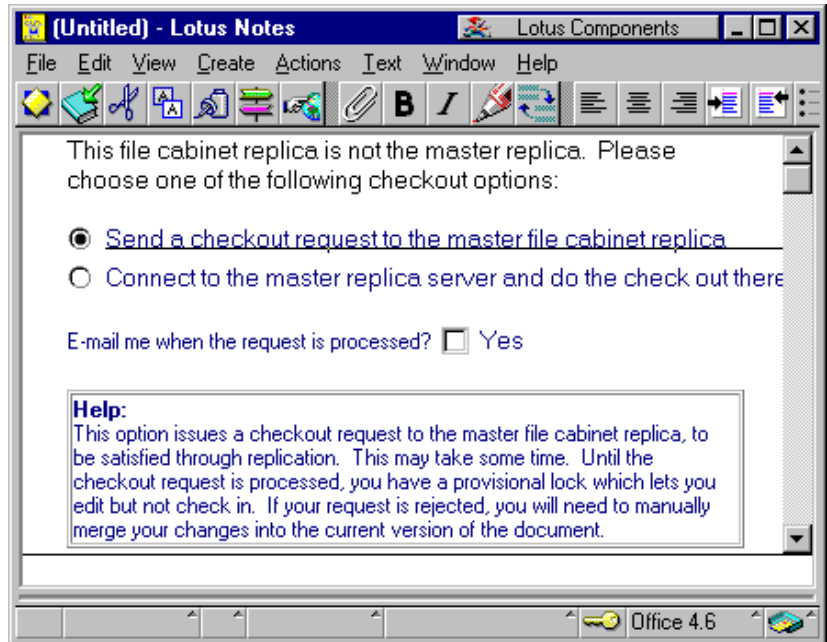
4. Choose one of the check-out options:

- **Send a checkout request to the master file cabinet replica** This option sends a check-out request to the master file cabinet replica, grants you a provisional lock on the document, and gives you a working copy for editing.

  Note You can't check in the document until the master file cabinet processes your check-out request.

  If you'd like to receive an e-mail notification when the request is processed, check the "Yes" beside the option "E-mail me when the request is processed?"

- **Connect to the master replica server and do the check out there**
  This option opens the master file cabinet replica, if it is accessible over the network. The document is immediately checked out on the master replica, and a working copy is replicated to your file cabinet replica.

  Note This option is only available from Notes.

5. Do one of the following:

   - Click Edit Document to launch the application associated with this document and modify the document now.
   - Click Edit Document Profile to change the document title, type, or field attribute values.
   - Click Edit Security to change the Document Editor, Reader, Editor, or Manager list for this document, providing you have the access.
   - Click Move to Binder to move the document to a different binder.
   - Click Return to Library if you want to edit the document later.

6. When you have finished making your changes, check the document back in.

For more information, see "Checking in a document from Notes" later in this chapter.

Note If you made changes to a working copy before your check-out request was processed, you'll have to wait until you receive the lock to check it back in. If the document is currently checked out to someone else, if it has been moved to a different binder, or has been deleted from the master file cabinet, your request will be rejected. If someone else made changes to the document before you received the lock, you'll have to resolve the conflicts.

For more information, see "Handling a document check-out rejection" and "Resolving a document check-out conflict" later in this chapter.

Handling a document check-out rejection
If you send a check-out request to the master file replica and the document you requested is already checked out to someone else (but didn't show as being locked because of replication timing), your request is rejected. The Checkout Rejection Notice, illustrated below, displays.

Close | Retry Checkout | Cancel Checkout | Working Copy | Help

Checkout Rejection Notice

The document you requested cannot be checked out because of the following reason:

The document is already checked out

You can use the "Retry Checkout" button to issue another check out request. Or, you can use the "Cancel Checkout" button to cancel your check out and discard your changes.

Title:	Employee A
Created By:	Molly Brown/Domino.Doc on 05/12/98 08:59:06 AM
* Checked Out By:	Molly Brown/Domino.Doc
Version:	1.0
Document Type:	Review and Approval Sample

Do one of the following:

- Click Retry Checkout to resubmit the request, keeping the provisional lock on the document and maintaining your changes.

- Click Cancel Checkout to cancel the request and discard your changes.

  Note Click Working Copy to open your working copy so you can save your file attachment before discarding your changes.

Resolving a document check-out conflict

If you send a check-out request to the master file replica and the document you requested is currently available, but has been modified since you sent the request, the document is checked out to you, but you must resolve any differences between your working copy and the master document before you can check it back in.

The Checkout Conflict Notice, illustrated below, reports which document attributes were modified (Document Profile, Document Security, or Document Content). You can also access a table of some of the key fields in your working copy and the master copy. Sometimes Domino.Doc cannot determine what has been changed since your check-out request was issued (for example, when a document gets checked in and a new version isn't created). In these cases, be very careful not to accidentally overwrite someone else's work. To review your working copy or the master copy; click View Your Copy or View Master Copy respectively.

To resolve document check-out conflicts, determine which copy is correct, your working copy or the master document, and do one of the following:

- Click Discard Changes to disregard your changes during check in.
- Click Merge Changes to selectively incorporate your changes into the master document during check in.

Domino.Doc will redisplay the Checkout Conflict Notice and present you with Conflict resolution options for profile conflicts, security conflicts, and content conflicts.

Choose "Keep your changes" if your changes to this attribute are more current; otherwise, choose "Discard your changes" even if you did not change this attribute so your working copy does not overwrite the master document during check-in.

If content conflicts exist, you may want to choose "Discard Changes" which will update your working copy with the current master document, and then you need to incorporate your edits into the most current version.

Editing a document from Notes

After finding, opening and reading a document, you may want to edit it. A document must be checked out for editing, and then checked back in. At that time, you can choose to replace the original or create a new one. If you find a document and choose Edit Document, it will automatically be checked out for you (if not already checked out).

Procedure

If you checked out the document from within your ODMA-enabled application, it is already open; skip to step 3.

To check out and edit the document, perform the following steps:

1. Click Edit Document.

   The application associated with the document launches and opens your document for editing.

   Note You must have the application associated with the document installed in order to view and edit the document. If there is no application associated with the document file type, the Open With dialog box will display and prompt you to choose the program you want to use.

2. Make your changes and save them.

3. When you have finished making your changes, close the document.

   The Check In dialog box displays.

4. Do one of the following:

   • Choose "Yes" for the Check In? option if you want to check the document in now.

   • Choose "No" for the Check In? option if you want to check the document in later.

5. If you choose to check the document in now, select a Check In Option.

6. (Optional) Enter a description of your changes.

7. Click OK.

Your changes will be applied to all replicas of this file cabinet when replication occurs.

Changing a document profile from Notes

You can check out and edit a document profile to change the information in it.

Procedure

To edit a document's profile information while working in Notes, perform the following steps:

1. Check out the document.

2. Open the working copy.

3. Click Edit Profile.

4. Change the document title, type, or field attribute values.

5. Modify the description field.

6. Click Save to save your changes.

7. Click Check In to check the document back in.

8. When the Check In dialog box displays select a check-in option.

9. (Optional) Enter a comment or a description of your changes.

10. Click OK.

Your changes will be applied to all replicas of this file cabinet when replication occurs.

Changing document security from Notes

You can change the security settings on an existing document that has been checked out for editing. Your changes will be applied to all replicas of the file cabinet that contains the document when replication occurs. For more information, see "About document security" in Chapter 5, "Working with Documents."

Procedure
To change a document's security, perform the following steps:

1. Check out the document.

2. Open the working copy.

3. Click Edit Security.

4. Turn off the default list check box for the permission level you want to change.

   For example, to change the list of users who can edit the document, turn off "All binder editors and above."

5. Click Add/Remove.

6. To add groups or individuals to the access list, do the following:

   • To include an entire group, select the group from the drop-down box, and then click Add Group.

   • To include only some members of a group, select the group from the drop-down box, select the individual members you want in the "Selection list" box, and then click Add.

   • To include an individual user, select the user in the "Selection list" box, and then click Add.

7. To remove groups or individuals from the access list, select the names in the "Added" box, and then click Remove.

8. Click OK.

9. Click Save to save your changes.

10. Click Check In to check the document back in.

11. When the Check In As dialog box displays select a check-in option.

    Note For more information, see "About checking in a document" in Chapter 5, "Working with Documents."

12. (Optional) Enter a comment or a description of your changes.

13. Click OK.

Checking in a document from Notes

If you checked out a document and closed it without checking it back in, it remains locked and unavailable to others.

Note In order to check in a document from a non-master file cabinet, you must have received a check-out lock from the master file cabinet; you must check the document back in from the same non-master file cabinet from which you requested the check-out; and, you must resolve any check-out conflicts.

Procedure
To check in the document, perform the following steps:

1. From the Domino.Doc library, click Checked out Documents.

2. Double-click on the document you want to check in.

   The Document Profile displays.

3. Click Check In.

   The Check In dialog box displays.

   Note This dialog box will not display if your checked-out document, document profile, or security has not been changed. The document will automatically be checked in at this point.

4. Check the document in.

5. (Optional) In the Comment box, enter a description of your changes.

6. Click OK.

Creating a document version from a checked-in draft

After you have checked in a draft document, you can make it a version at any time as long as it's not in a review or approval cycle.

Procedure
To create a version from a checked-in draft, perform the following steps:

1. Open the file cabinet and binder that contains the draft.

2. Do one of the following:

- Double-click the draft if your binder Table of Contents design uses Notes folders.

- Click your right mouse button, then select Go to Latest if your binder Table of Contents design uses BinderTOC ActiveX control.

3. Click Create Version.

4. Do one of the following:

- Choose Create new version to maintain the previous version and create a new version.

- Choose Replace current version to replace the previous version with your changed version. This option deletes the drafts on which the prior version was based.

5. (Optional) Check Delete drafts if you do not need to keep prior drafts for document history.

6. (Optional) Enter a comment.

7. Click OK.

Forwarding a document from Notes

You can forward a Domino.Doc document to one or more people by e-mail, if you have at least Editor access. You can forward either the document contents or a URL and Notes document link. You can forward more than one document at a time.

Procedure

To forward a document, or documents, perform the following steps:

1. Open the binder that contains the document, or documents, you want to forward.

2. Select the document, or documents, you want to forward.

   If your binder Table of Contents uses Notes folders, click on the document name to select a single document, or click in the column to the left of the document names to select multiple documents.

   If your binder Table of Contents uses the BinderTOC ActiveX control, you can select multiple documents by using shift-click or control-click.

3. Choose the Forward option.

- If your binder Table of Contents uses the BinderTOC ActiveX control, right-click the selected document, and choose Forward Documents from the menu.

- If your binder Table of Contents uses Notes folders, click the Forward button on the toolbar.

4. In the memo form that opens, use the header fields (To:, cc:, bcc:) to enter the complete e-mail address of the person (or persons) you want to forward the document (or documents) to. Click on the "To" field to select from a list of file cabinet participants.

5. Change the subject of the memo, if you don't want to use 'Domino.Doc:' followed by the document name, or names.

6. (Optional) Enter additional comments.

7. Click Send Contents to forward the document contents including view files, or click Send URLs to forward links to the document (or documents).

For information on other ways to integrate Domino.Doc information with e-mail, see Chapter 10, "Integrating Domino.Doc with E-mail."

Moving a document to a different binder

You can move a document to a different binder if you have at least Manager access to the document and it is not checked out by another user. Also, you must have Editor access to the current binder and the one you want to move the document to. The document security will be updated to that of the new binder. In order to avoid replication conflicts, you can move a document to a different binder in the master file cabinet only.

Note   You can move only the most recent document, or its working copy. It must be the current version if there are no drafts, or the current draft.

Procedure
To move a document to a different binder, perform the following steps:

1. Open the file cabinet and binder that contains the document you want to move.

2. Access the document profile.

3. Click Move to Binder.

4. The Select Binder dialog box displays.

5. Choose the binder you want to move the document into.

6. Click OK.

Copying a document to a different binder

You can create a copy of a document in another binder in the same file cabinet, or in a different file cabinet. The destination file cabinet must allow the type of document being copied, and you must have user access to it.

In order to copy the document, you must have Editor access to all versions of the document. Also, you must have Editor access to the current binder as well as to the one you want to copy the document to.

If the binder you want to copy is checked out, the new copy will not be checked out.

If the document is in a review or approval cycle, the new copy will not be in the review or approval cycle and review copies and comments will not be copied.

The document security for the new copy will be based on the security of the new binder or file cabinet.

If the document type subform contains fields with computed values that are dependent on the file cabinet and/or binder that the original document is in, these will not be recalculated automatically when the document is copied.

You'll need to check out the document and make any required profile field changes.

Procedure

To copy a document to a different binder, perform the following steps.

1. Open the file cabinet and binder that contains the document you want to copy.

2. Double-click the document you want to copy.

3. From the Actions menu, choose Copy to File Cabinet.

   The Copy to Binder dialog box displays.

4. Indicate whether you want to copy only the latest version or all versions of the document.

   Note For each version copied, all drafts based on that version will also be copied.

5. Choose the file cabinet that contains the binder you want to copy the document into.

6. Accept the default or select a different binder for the document.

7. Click OK.

Bookmarking a document

You can create a link to a document, called a bookmark, and place it in one or more other binders.

Procedure

To create a document bookmark, perform the following steps:

1. Open the file cabinet and binder that contains the document you want to link to.

2. Access the document profile of the current draft or version of the document you want to link to.

3. Choose Actions - Copy Bookmark to Binder.

   The Select Binder dialog box displays.

4. Choose the binder you want to copy the document into.

5. Click OK.

Deleting documents

You can delete documents from a Domino.Doc library from Notes, if you have the required access. You can delete document drafts, versions, or review copies. The options presented when you initiate a delete request depend on the document version and document life cycle stage.

For more information, see "About deleting documents" in Chapter 5, "Working with Documents."

To delete a document, open the file cabinet and binder where the document resides and perform one of the following procedures:

Deleting all drafts of the current version

You can delete all drafts of a document that are based on the current version by performing the following steps:

1. Do one of the following:

   - Click on the document name if you do not need to open it, then click Delete Documents.

   - Double-click the current draft to open it, then click Delete.

   The Delete Confirmation dialog displays.

2. Check the option "Delete all drafts associated with this version."

3. Click OK.

   All drafts associated with the current version of the document are deleted.

Deleting the current version

You can delete the current version of a document by performing the following steps:

1. Do one of the following:

   - Click on the document name, if you do not need to open it, then click Delete Documents.

   - Double-click the version to open it, then click Delete.

   The Delete Confirmation dialog displays.

2. Click OK.

   The current version of the document and all associated drafts are deleted from the file cabinet.

Deleting all versions

You can delete all versions of a document by performing the following steps:

1. Do one of the following:

   - Click in the left-most column to select the document if you do not need to open it, then click Delete Documents.

   - Double-click the version to open it, then click Delete.

   The Delete Confirmation dialog displays.

2. Check the option "Delete all versions."

3. Click OK.

   All versions and drafts of the document are deleted from the file cabinet.

Deleting the current draft

You can delete the current draft of a document by performing the following steps:

1. Do one of the following:

   - Open the draft, then click Delete.

   - Click on the document name if your binder Table of Contents design uses Notes folders, then click Delete Documents.

   Note Draft documents do not display if your binder Table of Contents design uses the BinderTOC ActiveX control. Select the associated document version, click your right mouse button and select Go to Latest, then click Delete.

   The Delete Confirmation dialog displays.

2. Click OK.

   The draft is deleted from the file cabinet and if there was a previous draft, it becomes the current document.

Deleting draft review copies

After a draft review cycle is completed, and the edits and comments have been incorporated into the document, the initiator can delete the review copies and all edits and comments associated with them if they are not needed for document history. You must be the review originator to perform this procedure.

To delete the review copies of a document, perform the following steps:

1. Double-click the review draft.

2. Click Delete Review Documents.

3. At the prompt "Are you sure you want to delete all review comments and review copies associated with this draft?" click Yes.

Submitting a document for review

A draft document can be routed for review, providing that the review option is not disabled on the document type form. If the document you want reviewed is currently a version, you'll have to check it out and check it back in as a draft.

Document reviewers are notified by e-mail that they are to review the document. Depending on how the review cycle was set up, the reviewers will be able to add comments, edit the content, or both. The notification contains a link to the document that the reviewer can access by simply clicking on it.

You can add or remove reviewers after setting up the review cycle, or cancel the review. You can also consolidate the review comments.

The review can be performed by the reviewers from any Domino.Doc interface, including Notes.

Procedure

To initiate a review cycle, perform the following steps:

1. Open the file cabinet and binder that contains the document you want reviewed.

2. Open the document profile, and click Submit for Review.

   Note If you are working in a non-master file cabinet, you first have to check out the current draft.

   The Select Reviewers dialog box displays.

3. Specify the document reviewers:

   - Choose All Draft Editors

   - Choose All Document Managers

   - Select specific reviewers

   Note The list of reviewers included in "All Draft Editors" and "All Document Managers" is determined by the document's security settings. For example, only users who are listed as a document manager in the security settings are included in the life cycle process when "All Document Managers" is selected; users who are invited to the file cabinet as managers are not included. Likewise, managers who appear in the Selection List in the Setup Review dialog box are not automatically included when "All Document Managers" is selected.

4. Specify the routing type:

   - Choose serial if you want each reviewer to review the document in sequence in the order established by the initiator.

   - Choose parallel if you want each reviewer to review the document at the same time.

5. Specify a time limit option:

   - Choose "Send reviewer a reminder after time limit expires," then enter the number of days to allow.

   - Choose "Send originator a notification after time limit expires," then enter the number of days to allow.

6. Indicate whether to notify the review originator after the final review or after each review.

7. Indicate what kinds of edits the reviewers can make: comments only or content.

8. (Optional) Enter a message to the reviewers.

9. Click OK.

Specifying document reviewers

When you are setting up a document review, you need to specify who should review the document. To specify reviewers other than "All Draft Editors" and "All Document Managers," use the Select Reviewers dialog. For example, you may want to make all or select members of a group reviewers.

Procedure

To specify document reviewers use the Select Reviewers dialog box:

1. Select a group.

   The names of the group members display in the Selection list.

2. Do one of the following:

   - Click Select All if you want all members of the group to review the document.

   - Select individuals to review the document.

   Click Deselect All to clear your selections.

3. Click Add when you have selected the appropriate document reviewers.

   The names you specified appear in the Added list.

4. (Optional) If you chose the Routing Type "Serial," select a name and click Move Up or Move Down until the reviewer appears in the proper sequence in the list. Repeat until the names in the list appear in the order in which you want them to review the document.

5. Click OK.

Changing the document reviewer list

After submitting a document for review, the review initiator can change the order of the reviewers, and can add and remove reviewers who have not yet reviewed the document. If, for example, you included someone who is on vacation and won't be back within the review cycle, you may want to remove that person and add someone else.

Procedure

To change the document reviewer list, perform the following steps:

1. Open the file cabinet and binder that contains the document.

2. Open the document profile.

3. Scroll to the Review Status section and click Edit Reviewers.

4. Add, remove, and move reviewers as necessary.

    Note You cannot remove from the list a user who has already reviewed the document.

5. Click OK.

Canceling a review cycle

The review initiator (or a manager of the file cabinet) may cancel a review cycle any time during the review process prior to Review Complete. Canceling a review returns the document to the authoring state and preserves existing review edits and comments until the document is resubmitted for review.

To cancel a review, open the document and click Cancel Review.

Consolidating review comments

Review comments are added and stored on a Review Copy document, a document that is a response to the draft being reviewed. In a parallel review, each reviewer creates and edits a separate review copy. After the review cycle is complete, the initiator or any other draft editor must decide how to consolidate or incorporate the review edits and comments.

You can copy the review copy into the checked out draft, providing the draft status is Review Complete.

Alternatively, you can check out the current draft and enter all of the edits and comments, or you can create a new draft based on one of the review copies.

Procedure

To copy the review copy into the current draft, perform the following steps:

1. Check out the draft.

2. Click Import Review Copy.

    If there is only one review copy, it will be copied into the draft.

    If there are multiple review copies, the list of review copies displays. Select the one you want to copy and click OK.

Reviewing a document

In a serial review, all reviewers edit and/or comment on the document in sequence in the order established by the initiator. In a parallel review, each reviewer edits and/or comments on the document at the same time. When the review cycle is complete, the initiator can delete the review copies and all edits and comments associated with them.

Procedure

To review a draft document, perform the following steps:

1. From the library, click Life Cycle Status.

    A list of documents and their current life cycle status displays.

2. Select the document and open the document profile.

3. Click Open Review Copy.

    What you can do depends on how the review cycle was set up. Perform either or both of the following actions:

    *   Edit the content.
    *   Enter a comment.

4. If you have saved your review copy locally on your hard disk, click Attach File, enter the path and file name (or click Browse to select the file), then click Save.

5. Click Complete Review from the draft document when you have finished editing or commenting on the document.

    If others need to review the document, the document state remains In Review and the document is routed to the next reviewer.

    If you are the final reviewer, the document state is changed to Review Complete and the document review initiator is notified.

    Note Once a review is complete, the review copy can be viewed, but not edited.

Submitting a document for approval

A draft document can be routed for approval, providing that the approval option is not disabled on the document type form. If a review cycle is required for the document, the document state must be "Review Complete."

Document approvers are notified by e-mail that they are to approve or reject the document when you complete this procedure.

Procedure

To submit a document for approval, perform the following steps:

1. Open the file cabinet and binder that contains the document you want approved.

2. Open the document profile, and click Submit for Approval.

   Note If you are working in a non-master file cabinet, you'll first have to check out the current draft.

3. Specify the document approvers:

   - Choose All Draft Editors

   - Choose All Document Managers

   - Select specific approvers

   Note The list of approvers included in "All Draft Editors" and "All Document Managers" is determined by the document's security settings. For example, only users who are listed as a document manager in the security settings are included in the life cycle process when "All Document Managers" is selected; users who are invited to the file cabinet as managers are not included. Likewise, managers who appear in the Selection List in the Setup Approval dialog box are not automatically included when "All Document Managers" is selected.

4. Specify the routing type:

   - Choose serial if you want each approver to approve the document in sequence in the order established by the initiator.

   - Choose parallel if you want each approver to approve the document at the same time.

5. (Optional) Specify a time limit option:

   - Choose "Send approver a reminder after time limit expires," then enter the number of days to allow; or de-select this option.

   - Choose "Send originator a notification after time limit expires," then enter the number of days to allow; or de-select this option.

6. Indicate whether to notify the approval originator after the final approval or after each approval.

7. Indicate what to do on approval completion: check in as a new version, check in and replace current version, or return to the initiator.

8. Click OK.

Note If a document is rejected, it cannot be immediately resubmitted for approval because Domino.Doc assumes that the document needs further revision. To resubmit the document for approval when no further changes are required, first check out the document, click any of the Edit options (for example, Edit Document, Edit Profile, or Edit Security), and then check in the document as a draft.

Specifying document approvers

When you are setting up a document approval cycle, you need to specify who should approve the document.

Procedure

To specify approvers other than "All Draft Editors" and "All Document Managers," for example, all members or select members of a group, choose Approvers from the Setup Approval form and do the following:

1. Select a group.

   The names of the group members display in the Selection list.

2. Do one of the following:

   • Click Select All if you want all members of the group to approve the document.

   • Select individuals to approve the document.

   Click Deselect All to clear your selections.

3. Click Add when you have selected the appropriate document approvers.

   The names you specified appear in the Added list.

4. (Optional) If you chose the Routing Type "Serial," select a name and click Move Up or Move Down until the approver appears in the proper sequence in the list. Repeat until the names in the list appear in the order in which you want them to approve the document.

5. Click OK.

Changing the document approver list

After submitting a document for approval, the review initiator can change the order of the approvers, and can add and remove approvers who have not already approved the document. If, for example, you included someone who is on vacation and won't be back within the review cycle, you may want to remove that person and add someone else.

Procedure

To change the document approver list, perform the following steps:

1. Open the file cabinet and binder that contains the document.

2. Double-click the document to access the document profile.

3. Scroll to the Review Status section and click Edit Approvers.

4. Add, remove, and move approvers as necessary.

    Note   You cannot remove from the list a user who has already approved the document.

5. Click OK.

Canceling an approval cycle

The approval initiator (or a manager of the file cabinet) may cancel an approval cycle any time while the document is in the Pending Approval state. Canceling an approval returns the document to the previous state and preserves existing approval comments. To cancel an approval cycle, simply open the approval copy and click Cancel Approval.

Approving or rejecting a document

To approve or reject a document in an approval cycle, perform the following steps:

1. From the library, click Life Cycle Status.

    A list of documents and their current life cycle status displays.

2. Select the document you want to approve.

3. (Optional) Click View if you'd like to read the document content.

4. Do one of the following:

    • Click Approve.

       If others need to approve the document, it remains in the Approval state and is routed to the next approver.

       If you are the final approver, the document state is changed to Approved and is either returned to the approval initiator, checked in as a new version, or checked in to replace the current version depending on how the approval cycle was set up.

    • Click Reject.

       The approval cycle ends and the document state is changed to Rejected.

Note If the document is rejected, it cannot be immediately resubmitted for approval because Domino.Doc assumes that the document needs further revision. To resubmit the document for approval when no further changes are required, first check out the document, click any of the Edit options (for example, Edit Document, Edit Profile, or Edit Security), and then check in the document as a draft.

Manually archiving a document from Notes

A document can be archived from the master file cabinet only. Also, a document can be archived only if the System Administrator set the Document Type to allow archiving. For more information, see "About archiving documents" in Chapter 5, "Working with Documents."

When archiving from Notes you initiate the archiving agent immediately, if necessary.

Procedure
To archive a document from Notes manually, perform the following steps:

1. Open the master file cabinet and the binder that contains the document or documents you want to archive.
2. Open the document that you want to archive, if you are an Administrator.
3. Drop down the Actions menu and then select Mark for Archive.

    The Mark for Archive options display.
4. Specify an archiving option for the document versions:
    - Archive all versions.
    - Archive all versions except the most recent.
    - Archive only the selected version.
5. Specify an archiving option for the document drafts:
    - Leave drafts alone.
    - Archive drafts when version is archived.
    - Delete drafts when version is archived.
6. Click OK.

Canceling an archive request
If you have marked a document for archive and it has not yet been archived, you can cancel the request, if you need to.

Procedure

To cancel an archive request and unlock the document, perform the following steps:

1. Open the master file cabinet and the binder that contains the document.
2. Open the document.
3. Drop down the Actions menu and then select Unmark for Archive.

   This cancels the archive request.

Retrieving documents from archive

A document that has been archived can be retrieved from any replica, but the information itself will be restored to the master file cabinet replica.

Procedure

To retrieve a document from archive, perform the following steps:

1. From the library, open the file cabinet and the binder that contains the proxy document (indicated by a cylinder-shaped icon).
2. Select the document and click Edit.

   The following message displays: "The document you have requested has been archived. Would you like to issue a retrieval request?"
3. Click Yes.

   The next time the Archive Agent runs, the file attachment is retrieved from the storage system and restored to Domino.Doc. You will receive an e-mail notification when the document is available with a link and a URL to the document.

   The document is re-archived based on the document type option "When should documents be marked for archiving."

Re-attaching an archived file

You can specify a file to be attached to an archived document if the archived file has been lost or corrupted.

Procedure

To reattach an archived file, perform the following steps:

1. Open the master file cabinet and the binder that contains the document you want to reattach.
2. Open the document.
3. Drop down the Actions menu and then select "Reattach archived file."

   The Reattach archived file dialog box displays.
4. Click Attach File and select the file you want to attach.

   You can only select one file attachment.

5. Specify a temporary directory for the file if it is different than the default: c:\lotus\notes\data (or wherever your Notes/data directory is located).

Using Who Is Online

If Sametime integration is enabled for both your Domino.Doc library and for the file cabinet containing the document or binder you have open, you can use the Who Is Online feature to access Sametime to communicate with other users of the document who are online.

When Sametime integration is enabled:

- A Who Is Online tab appears to the right of the Document Profile, Security, Revision History, and Workflow tabs when you have a document open.

- A Who Is Online box appears when you have a Review Copy or Review Comment form open. (You may have to click on a twistie to open it.)

The icons and general capabilities follow the Sametime conventions. However, the list of Sametime users is limited to those persons who have Manager or Editor access to the document, and is categorized by managers, editors, reviewers, and approvers insofar as those categories are populated.

Procedure

To look for who is online to discuss a document, perform the following:

1. Open a document you want to discuss, or select Review Copy or Review Comment form.

2. Click the Who Is Online tab or field.

   A window opens with a list of who is online with Sametime.

3. Double-click to select a name and initiate a chat.

4. Right click to get the option for a single chat or to invite all users.

5. Send a message, or invite all to activate a floating Sametime window that you can use for Sametime operations.

Using the Discussion Forum from Notes

You can use the Forum feature to initiate a discussion forum around a document, or to add a topic to an existing discussion thread, and to read the discussion documents that have evolved. The visibility of topics and responses is limited to the user's access to the related document. For example, if only Draft Editors have access to a document, you will not see the discussion unless you have Draft Editor status.

For more information, see "About discussing documents in the Forum" in Chapter 5, "Working with Documents."

Navigating the discussion thread

With a discussion forum open, you can view the entire discussion thread on a document. It allows you to view all main topics and responses, insofar as your user security level allows. A navigation display is included for every main topic and response. This display shows a maximum of 21 documents at a time, arranged in a topic-and-response hierarchy, with the current document approximately in the center. (Its position depends on how close the current document is to the very beginning or very end of the thread.)

To navigate through the discussion:

- Double-click any discussion document link to open the topic or response document.
- Click the buttons on the toolbar as follows:
  - **Close** to return to the document view.
  - **New Main Topic** to create a new topic in the thread.
  - **New Response** to create a response to an existing topic or response.
  - **Refresh** to update the list.
  - **Previous** or **Next** to move up or down the list one document at a time.
  - **View All** to open a popup window that shows links for all main topics in the thread. Clicking a link in the popup window displays the selected topic or response and closes the popup window.
  - **Search** to enter a search query to find a particular discussion document in a thread. You can search for text only in the discussion document's subject field and the document content. Search results display in a new page where you can either perform a new search, or view the search results. Each search result is a link that you can click to open the selected document.
  - **Delete** to delete every discussion document in the thread, or just the current document. Deleting the current document also deletes all of its response documents.

  Note Only managers of the related Domino.Doc document (Discussion Document Managers) can use the delete option.

Creating a new main topic for discussion

When a Domino.Doc document is initially created it has no related discussion documents, and will not have any until you create one. This could be immediately after creating the document, or at any time later.

Note If you are creating the initial topic for a forum you may have to close and reopen the binder and document after creating the first main topic in order to get the Go to Forum link to appear on the screen.

To create the first main topic, or add a new one perform the following:

1. Open a binder and select the document you want to discuss.
2. If your file cabinet uses the BinderTOC ActiveX control for the binder Table of Contents, right-click the document you want to discuss and choose Discussion Forum.

    Alternatively, you can open the document profile and choose Actions - Create Forum Topic.

    If this is the first main topic for the document, respond Yes to the message box asking if you want to create one.
3. If your file cabinet uses Notes folders for the binder Table of Contents, open the document and choose Actions - Create Forum Topic.
4. If topics already exist, click the New Main Topic button from within the discussion forum, or choose Actions - Create Forum Topic.
5. Enter a subject line and your comment in the space provided.
6. Click Save and Close.
7. Click Refresh to see your topic added to the list.

Opening a discussion thread and adding a response or new main topic
If a forum has been started on a document, you can respond to a topic already in the discussion thread, or create a new main topic, from any version or draft of a document.

Selecting Discussion Forum, or Go to Forum, opens the newest main topic that was created for this document. From the forum you can view the entire discussion thread, including all main topics and responses, (insofar as your user security level allows).

Note Responses cannot be nested to a depth greater than 32.

To add a response or topic perform the following:

1. Open a binder and select the document you want to discuss.
2. If your file cabinet uses the BinderTOC ActiveX control for the binder Table of Contents, right-click the document you want to discuss and choose Discussion Forum.

    Alternatively, you can open the document profile and choose Actions - Create Forum Topic.
3. If your file cabinet uses Notes folders for the binder Table of Contents, open the document profile and click on the Go to Forum link at the lower left.

    Alternatively, you can open the document profile and choose Actions - Create Forum Topic.

4. To add a new topic, click the New Main Topic button.

5. To add a response, select a main topic, or a response, and then click the New Response button.

6. Enter a subject line and your comment in the space provided.

7. Click Save and Close.

8. Click Refresh to see your topic or response added to the list.

Chapter 7
Working with Domino.Doc from a Browser

This chapter describes how the user navigates the Domino.Doc library from the Web, using the browser interface to find and manage the contents of the file cabinets.

- About working with Domino.Doc from a browser
  - Navigating Domino.Doc from a browser
  - Domino.Doc icons for the browser
  - Searching from a browser
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- Working with a binder from a browser
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- Working with a document from a browser
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  - Bookmarking a document

- Deleting a document from a browser
- Submitting a document for review
- Submitting a document for approval
- Manually archiving a document from a browser
- Using the Discussion feature in the browser

About working with Domino.Doc from a browser

Domino.Doc supports both the Internet Explorer and Netscape browsers for accessing your libraries.

For more information about using Domino.Doc with a browser, see "Setting up for using a Web browser" in Chapter 2, "Getting Started."

What you see, and what you can do, while working in Domino.Doc from a Web browser depends on your role, and the security imposed on the contents of the library.

In general:

- The amount of information displayed for Domino.Doc administrators is more than what users see.
- The number of documents accessible also varies according to your access level and the security values set on the various file cabinets, binders, and documents in the system.

While administrators see all file cabinets and all checked-out binders and documents, most users see only the file cabinets that they can access, or the documents and binders that they have checked out.

Users also see some differences depending on the functions enabled when the library, or a file cabinet, was set up.

Note   If you used an earlier version of Domino.Doc from your browser, you will need to replace any Bookmarks (Netscape) or Favorites (Internet Explorer) to your libraries. Create a new bookmark or favorite when you enter the library, then use it and refresh the page.

Navigating Domino.Doc from a browser

When you access a Domino.Doc library from a Web browser you'll find navigating Domino.Doc easy because of the layout of the workspace, and the direct access to your documents from lists and icons.

When you first access the library, your workspace will display only the library hierarchy. After you have worked with Domino.Doc for a while, it will appear as described here.

What you see as you navigate depends on your role and access level, with Administrators generally having a fuller view.

The Domino.Doc logo displays in the upper-left area of the workspace. You can click on the logo to see the Domino.Doc About box that contains the product version and copyright information. When Domino.Doc is processing a request for you, an animated wheel graphic appears next to the logo.

Across the top of the workspace is a menu bar. It is populated with buttons that have pull-down lists. The contents of this bar vary according to the item you are working with and the activity you have engaged.

At all times, a **Search** box is present at the top right side of the menu bar for quick access to either a simple search or advanced searching.

You can also click on **Getting Started** to download and install the Desktop Enabler, for managing Domino.Doc settings and working with integrated applications.

Below the logo is a list of views you can summon: your home page, and your documents by categories. Click on any of these items to change the contents of the view pane.

The lower left side of the workspace contains the **Site Map**, a graphical representation of where objects are in the library you are accessing. Similar to the navigation pane used by Windows Explorer, it shows the hierarchy of the library with an array of file room, file cabinet, and binder icons. (If there are no documents in the library you will see only cabinets.) You click on the plus (+) or minus (-) signs to expand or collapse the hierarchy, and click on the title beside the icon to view the contents list of a file cabinet or binder.

Tip   To widen the Site Map so that you can see more of its contents in Internet Explorer, place the pointer over the right edge of the Site Map until you see the cursor change to a double-headed arrow. Then, click and drag to resize the Site Map.

When you first access the library, your workspace will display only the library hierarchy. After you have worked with some documents, your home page will become populated with four boxes in the view pane that contain lists of your documents and/or binders in these categories:

- Favorites
- Checked-out
- Recently Edited
- Life Cycle

From this view you can simply click on the item you want to work with.

You can also use the list under My Documents to select a view of any of the five categories, if another view is open in the view pane:

- Favorites
- Checked-out
- Recently Edited
- Life Cycle
- Saved Searches

When you select one of these views (or click on 'more....' in one of the list boxes), the entire pane will be dedicated to the selected list.

Next, Previous, Expand, and Collapse buttons above and below the list are provided to allow you to scroll through the display area when you have more lines of information than fit on one page. Next and Previous move from page to page, while Expand and Collapse open and close categories.

When you hold the mouse pointer over a document title in the My Home Page view, a pop-up displays the description, document type, last activity date, author, and file cabinet name. If the item is a binder, it shows the binder type instead of the document type and description.

When you select a binder in the Site Map, a list of the documents in the binder appears in the view pane.

Domino.Doc icons for the browser

When working with Domino.Doc in a browser, understanding what these icons represent will help you to navigate quickly:

Library

File Room

File Cabinet

Binder Category

Binder

Info

Document-to-trash-can

Bookmark

Searching from a browser

Domino.Doc has a powerful search capability that allows you to search library-wide for documents, across multiple file rooms and file cabinets. It also allows you to set up search queries to specify particular locations and criteria for finding an item.

You can perform either a simple search, or an advanced search.

- To perform a simple search, enter a search string in the 'Search for' box, and click the Go button. Domino.Doc will search the library for any occurrence of this text and return a list of documents that contain it. A simple search takes longer than an advanced search because it searches the entire library.

- To perform an advanced search, use the procedure described below. You can search by words, or search by forms, if available. An advanced search limits the search to specific file cabinets, binders or document types, or to certain dates. You can restrict the number of hits returned, and specify how to arrange the view. (The forms search option is available only if the file cabinet creator customized the template to include SearchByForm as a custom subform.)

- You can save the search criteria, the query, so that if you need to perform the search again, you don't have to reenter complex definitions. Instead, you can open the query and initiate the search. You can also modify the query before performing the search.

- You can delete the query when you no longer need it. (You are limited in the number of searches you can have in your list. Therefore, when you no longer need a search, you should delete it.)

Performing an advanced search

To perform an advanced search, perform the following steps:

1. Click the Advanced Search link next to the search box at the upper right side of the Domino.Doc page.

2. Select a search type by doing one of the following:

   - Choose "By word," and specify the words you want to search for.

   - Choose the "By form" option, if forms exist, to select the appropriate form, then enter the field information you want to search for, separating multiple values with a comma.

3. Specify the file cabinets to search: all that you can access, or selected file cabinets.

4. If you chose selected file cabinets, select from the list the ones to search.

5. (Optional) Complete the Search constraints:

   • Specify what to search: documents and binders, only documents (the default), or only binders.

   • Choose specific types of documents and/or binders to search for (otherwise, all types will be searched).

6. Complete the Date information:

   • Specify whether to search for documents that were created or modified on, after, or before a specific date (the date format is dependent on geographic location).

7. (Optional) Specify the number of matches you want to view. The default, 0, will display all found results.

8. (Optional) Save your search criteria for later use by doing the following:

   • Click Save.

   • Enter a search query name.

   • Click OK.

9. Click Start Search to initiate the search.

   The search results display with links to the profiles of the found documents.

Reusing a saved search query

To reuse a search query you've previously saved, perform the following steps:

1. From My Documents click Saved Searches.

2. Select the query you want to use.

   The query information appears in the search form.

3. Do one of the following:

   • Choose Start Search to perform a search based on the query information.

   • Modify the search criteria and choose Save to replace the old query with the new.

Deleting a saved search query

To delete a search query, perform the following steps:

1. From My Documents click Saved Searches.

   Your list of saved queries displays.

2. Select the query you want to delete, and click OK.

    The query information appears in the search form.

3. Click Delete.

Managing favorites from a browser

Favorites lists provide a way to get quick access to items that you frequently use. From the browser you can add binders or documents to the list, or remove them.

- To add a binder to your favorites list, open the binder you want to add and click Add Binder to Favorites. At the prompt, "Add this binder to your Favorites list?" click OK.

- To add a document to your favorites list, open the document you want to add and click Add to Favorites. At the prompt, "Add this document to your Favorites list?" click OK.

- To remove a binder or document from your favorites list, from the Domino.Doc library, click Favorites and click on the delete icon (the document-to-trash-can) beside the binder or document you want to delete.

Note A deleted document may still appear in a favorites list.

Working with a binder from a browser

When you open a file cabinet from the library, you see all the binders contained in the file cabinet. Depending on your access rights, you may perform these activities:

- Open a binder and view the binder profile, security, or a report of binder activity
- Check out a binder to edit the profile or security
- Check in a binder
- Create a binder
- Change a binder's profile
- Change a binder's security
- Delete a binder
- Add a binder to your list of favorites
- Sort binders by title, author, type, or custom view

When you open a binder you see a list of the documents contained in the binder.

Note Binder actions are available based on your role and access level; only Administrators can perform all of these actions. All users, however, can add a binder to their favorites list, or change the sort order of the view.

Checked-out binder actions

When a binder has been checked out, its status changes to Read Only. Users can access it for viewing, but only the user who has checked it out can edit or delete it. When you check out a binder, a working copy is created so that you can edit the binder profile or security information. Actions on the checked-out binder are available only to the user who checked out the binder. An Administrator, however, can check in any checked-out binder.

A lock appears beside a checked-out binder when viewed from the file cabinet table of contents.

When you access the binder pull-down menu, you will see that Working Copy is checked if the binder is checked out.

Creating a binder

You can create a binder from your Web browser to hold your documents as you need them.

The new binder will be added to all replicas of this file cabinet when replication occurs.

When creating a binder you will be prompted by Domino.Doc to change the name of the binder, if it finds another binder with the same name. You can accept the duplicate name, or make a name change.

If the file cabinet profile specifies Notes folders for the binder Table of Contents, and if you are not an Administrator, the Table of Contents for the binder may not get created immediately.

Procedure

To create a new binder, perform the following steps:

1. Open the file cabinet where you want to put the binder.
2. Click Binder - New Binder.
3. Complete the following information:
   - Enter the binder title.
   - Select a different binder type if necessary.

   An Index Card of the fields that have been defined for this type of binder displays.
4. Enter the attribute values that are appropriate for your new binder.

5. (Optional) Change Reader, Editor, and Manager access rights.

6. Click Save when you've completed all of the binder information.

Checking out a binder from the master file cabinet

You must check out a Domino.Doc binder if you want to change its profile, or its security settings. Checking out a binder locks it so that other editors cannot modify it, and it creates a working copy of the binder.

Procedure

To check out a binder, perform the following steps:

1. Open the binder you want to change. Click on the binder name in one of the Home Page boxes, or use the Site Map to navigate to the file cabinet containing it and open it from the binder list.

2. Click Binder - Check Out Binder to check the binder out for editing.

3. Choose Binder - Edit Profile to change the profile.

4. Choose Binder - Edit Security to change the security information.

5. Choose Binder - Check In to save your changes and check the binder back into the file cabinet.

Checking out a binder from a non-master file cabinet

You must check out a Domino.Doc binder if you want to change its profile, or its security settings. Checking out a binder locks it so that other editors cannot modify it, and it creates a working copy of the binder.

If you are working in the non-master file cabinet, you can check out a binder in one of two ways, depending on how the file cabinet replica was configured:

- You can connect to the master server, if it is accessible to you.

- You can send a check-out request to the master file cabinet.

You must edit and check in the binder on the same server from where you checked it out.

Procedure

To check out a binder when you are not working in the master file cabinet, perform the following steps:

1. From the Site Map, open the room and file cabinet that contains the binder you want to change.

2. Open the binder you want to change.

   What happens next depends on how the file cabinet replica was configured. One of the following will occur:

- The binder opens for viewing only because it cannot be checked out for editing from this replica.

- A check-out request is sent to the master file cabinet and you receive a provisional lock on the binder and a working copy for editing, but you won't be able to check the binder back in until the check-out request is processed. Continue with step 6.

- The binder is immediately checked out of the master file cabinet and you receive a lock and a working copy for editing. Continue with step 6.

- The Check Out Options dialog box, illustrated below, displays.

3. Choose one of the following check-out options:

- **Send a check-out request to the master file cabinet replica** This option sends a check-out request to the master file cabinet replica, grants you a provisional lock on the binder, and gives you a working copy for editing.

- **Connect to the master replica server and do the check-out there** This option opens the master file cabinet replica if it is accessible over the network. The document is immediately checked out on the master replica, and a working copy is replicated to your file cabinet replicas.

4. If you'd like to receive an e-mail notification when the request is processed, check "Yes" beside the option "E-mail me when the request is processed?"

5. Change the profile and/or security information.

   Note Click Return to Library if you want to change the profile or security information later.

6. When you have finished making changes to the binder, click Save to save your changes and then Check In to check the binder back into the file cabinet.

   Note If you made changes to a working copy before your check-out request was processed, you'll have to wait until you receive the lock to check it back in. If the binder is currently checked out to someone else, or has been deleted from the master file cabinet, your request will be rejected. If someone else made changes to the binder before you received the lock, you'll have to resolve the conflicts.

Changing a binder profile

When you create a new binder in Domino.Doc, you provide a Binder Title and you choose a Binder Type from a predefined list. If the Binder Type has a set of fields (attributes), you can enter field values to further organize your documents. As binder manager, you can change this profile information later, if you need to.

Your changes are applied to all replicas of this file cabinet when replication occurs.

When changing a binder title, you will be prompted by Domino.Doc to change the name of the binder if it finds another binder with the same name. You can accept the duplicate name, or make a name change.

Procedure
To change profile information for your binder, perform the following steps:

1. Choose Binder - Check Out Binder to check out the binder you want to change.

2. Click Binder - Edit Profile.

3. Change the necessary information.

4. Click Save to save your changes.

5. Choose Binder - Check In to check the binder back into the Domino.Doc library.

Changing binder security

If you have Manager access to a binder, you can change its security settings. However, if binder security has been turned off for the file cabinet containing the binder the list of binder readers and editors cannot be changed.

For more information, see "About binder security" in Chapter 4, "Working with Binders."

The binder must be checked out in order to make any changes to the security settings.

Procedure

To change the access levels for a binder, perform the following steps:

1. Select the binder you want to change.
2. Choose Binder - Check Out Binder.
3. Choose Binder - Edit Security.
4. Click the check box "All file cabinet readers (or editors) and above" to deselect the default list.
5. Click Add/Remove to display the current user list for the binder.
6. Use the Selection list to select and add or remove groups or users.
7. Click OK.
8. Click Save or Cancel.
9. Choose Binder - Check In to save your changes and check the binder back into the Domino.Doc library.
10. Specify whether to save or discard changes.
11. (Optional) Enter a comment or a description of your changes.
12. Click Save to check in the binder.

Checking in a binder

You can check in a binder from either a master or a non-master library. After checking in a binder from a non-master file cabinet, the binder cannot be checked out again until the check-in has replicated to the master file cabinet.

Note If you make changes to a binder, remember to save the changes before you check in the binder.

Procedure

To check in a binder, perform the following steps:

1. Open the binder profile. Click on the binder name in Checked Out Items, or use the Site Map to navigate to the file cabinet containing it and open it from the binder list.

    The working copy opens and the Binder Profile displays.

2. Choose Binder - Check In to check the binder back in.

Deleting a binder

If you have manager access, you can delete a binder that does not contain any documents. You can delete a binder from any file cabinet replica, but in order to prevent replication conflicts, you must first check out a binder before you delete it from a non-master replica. You do not need to check out a binder to delete it from the master replica.

Note   If you are working in a non-master file cabinet, the binder can be deleted only from the file cabinet from which you requested the check-out. The binder will be deleted from all replicas of this file cabinet when replication occurs.

Procedure

To delete a binder, perform the following steps:

1. From the Domino.Doc library, open the file cabinet that contains the binder you want to delete.

2. Open the binder you want to delete.

3. Choose Binder - Delete Binder.

4. When asked if you are sure that you want to delete the binder permanently from the file cabinet, Click OK.

    If the binder contains any documents, you will receive a message informing you that the binder cannot be deleted unless it is empty.

Working with a document from a browser

When working with Domino.Doc from a browser you can have access to a document from several views — from the contents list of a binder, or in one of the other lists: Checked Out, Recently Edited, Favorites, Life Cycle.

Accessing a document from the binder contents

When displaying the contents of a binder, how you view a document or its profile depends on the Table of Contents design used by the file cabinet containing the document's binder.

If the file cabinet uses Notes folders to display binder contents, do the following:

- To display the document profile, click the document title.
- To view the document and any related attachments, click the document title (to launch the profile), and then choose View from the Document menu.

If the file cabinet uses the BinderTOC ActiveX control to display binder contents, do the following:

- To display the document profile, click the Info icon next to the document title.
- To view the document and any related attachments, click the document title.

Accessing a document from a list

When displaying the contents of a list such as Recently Edited or Favorites, you can view a document or its profile as follows:

- When working with a document list such as Recently Edited or Favorites, you can click the Info icon next to the document title to launch the document profile, getting access to the Security, Revision History, and Activity Log.
- When you click on a document title, you launch any attachments related to the document for viewing in read-only mode.

Document actions

If you have the required access, you can also:

- copy or move the document to a different binder
- delete the document
- check the document out and edit the content, the profile, and the security information
- forward the document — its URL or contents (or both, if you are using a Web browser) — to another user by e-mail
- create or continue a discussion forum around the document
- see who is online, with access to the document (requires Sametime integration enablement), to discuss the document

You can check an edited document back in and, based on document type, you can set up, submit, complete, and cancel review and approval cycles.

You can create a bookmark to link the document to different binders for easy access.

When working with a document from a browser, the actions available from Document on the toolbar vary depending upon the state of the current document. In all cases, available actions are also based on your role and access level.

When you open a document profile, you get access to the actions described in the table below when you choose Document from the toolbar. You also always have the option to view the document's Security, Revision History, and/or Activity Log. If you have a Workflow-enabled library, you can go to a Workflow page.

Document draft actions

If the current document is a draft, these actions are available.

Click this:	To do this:
View	Open the document for viewing.
Edit Document	Check out and edit the document contents.
Create Version	Change the document state from draft to version.
Check Out Document	Check the document out of the binder in order to edit or change the document content, profile information, or security.
Add to Favorites	Add a selected document to your favorites list for easy access.
Move to Binder	Select a different binder for this document. **Note** This function can be performed in the master file cabinet replica only.
Delete Document	Delete a selected document. **Note** This function can be performed in the master file cabinet replica only.
Copy Bookmark to Binder	Create a link to this document from a different binder.
Submit for Review	Start a review cycle.
Submit for Approval	Start the approval process.
Forward	Forward the document to another user.

Document review and approval actions

Providing review and approval options are specified, and drafts are not disabled for the type of document, you can perform these actions.

Click this:	To do this:
Submit for Review	Access the Setup Review dialog box in order to enter or change review cycle information, and initiate a review cycle for this document.
Open Review Copy	Open the review copy of the document for editing or for commenting.
Delete Review Documents	Delete all review comments and review copies associated with the draft after the review has been completed and the edits incorporated. (This can be done by the review initiator only.)
Complete Review	Mark the review complete and ready for approval.
Cancel Review	Cancel the review cycle for this document.
Submit for Approval	Access the Setup Review dialog box in order to enter or change approval cycle information, and initiate an approval cycle for this document.
Approve	Approve this document and, if you are the last approver, mark the approval cycle complete.
Reject	Reject this document and cancel the approval cycle.
Cancel Approval	Cancel the approval cycle for this document.

Document version actions

Document version actions are available based on the state of your current document. When you open a document profile you have the options listed here.

Click this:	To do this:
View	Open the document for viewing.
Edit Document	Check out and edit the document contents.
Check Out Document	Check the document out of the binder in order to edit or change the document content, profile information, or security.
Add to Favorites	Add a selected document to your favorites list for easy access.
Move to Binder	Select a different binder for this document. **Note** This function can be performed in the master file cabinet replica only.

Click this:	To do this:
Delete Document	Delete a selected document. **Note** This function can be performed in the master file cabinet replica only.
Mark for Archive	Archive the document.
Copy Bookmark to Binder	Create a link to this document from a different binder.
Forward	Forward the document to another user.

Document archiving actions

If the document type allows for manually archiving out-of-date documents to an external storage facility for easy retrieval, you can perform these actions.

Click this:	To do this:
View	Open the document for viewing.
Mark for Archive	Display the Mark for Archive dialog to specify archiving options for the document.
Unmark for Archive	Cancel the archive request for the document.
Retrieve Manually	Issue a retrieve from archive request for the document.

Checked-out document actions

When you check out a document, a lock appears beside it and it changes to Read Only so other users can access it only for viewing. A working copy is created for you to edit the document content, profile, or security information. The checked-out document actions are available only to you (except for Check-In, an activity that can be done by the Administrator on any checked out item).

Click this:	To do this:
Edit Document	Launch the application associated with the document and open it for editing. **Note** A document can only be changed on the server from which check-out occurred.
Edit Profile	Access the document profile form for changing profile information. **Note** Document profile information can only be changed on the server from which check-out occurred.
Edit Security	Access the document security form for changing the security. **Note** Document security can only be changed on the server from which check-out occurred.

Click this:	To do this:
Check In	Check the document into the binder, release the lock, and make it available to other editors.
Move to Binder	Select a different binder for this document. **Note** This function can be performed in the master file cabinet replica only.
Delete Document	Delete the document. **Note** This function can be performed in the master file cabinet replica only.
Forward	Forward the document to another user.

Adding an existing document to Domino.Doc from a browser

In order to make an existing document available in your Domino.Doc file cabinet, you need to create a new document within Domino.Doc, define and profile the document, attach your existing file, and check in the new document.

If you have many documents to add, you may want to use Notes to capture or import them. For information on these procedures, see Chapter 6, "Working with Domino.Doc from the Notes Client."

Note A document created on the Web without a file attachment is considered a Notes document.

Procedure

To add an existing document, perform the following steps:

1. From the Domino.Doc library, open the file cabinet and binder where you want to store this document.

   Note If necessary, you can create a new binder to put the document in.

2. Select a binder for this document, or add it to the current binder.

3. Choose Document - New Document.

4. Enter the document title.

5. Enter the complete path and file name in the Attach File input box, or click Browse to select a file.

6. (Optional) Enter description text in the Description field.

7. Select a different document type if necessary. The field attributes that have been defined for the document type display.

   Tip Select -No Type- if you do not require field attributes for this document.

8. Enter the attribute values for the document.

9. Examine the Security, and change the access for this document if necessary.

   Note For more information, see "Changing document security from a browser" later in this chapter.

10. Click Save.

11. Choose an option from the Check-in options displayed.

    Note For more information, see "About checking in a document" in Chapter 5, "Working with Documents."

12. (Optional) Enter a comment.

13. Click Save again to check in the document.

Opening a document for viewing from a browser

There are different ways to locate a document for read-only viewing in the browser:

- If you don't know where the document is stored, you can use Search, Advanced Search, or a Saved Search and view it from the search results.

- If you have recently edited it, you can open it from the Recently Edited list.

- If you have added it to your favorites, you can open it from the Favorites list.

- If it is in a review or approval process you can view it from the Life Cycle list.

- If it is checked out, you can open it from the Checked Out Items list.

- If the document does not appear in any of the ready lists, you can use the Site Map to open the file room, the file cabinet and then the binder that contains the document you want to open.

Note A document created on the Web without a file attachment will display "Notes document" as Content, although it may have been created from any other application.

To open a document for editing, see the following sections on checking out documents:

- Checking out a document from the master file cabinet from a browser

- Checking out a document from a non-master file cabinet from a browser

Checking out a document from the master file cabinet from a browser

Checking out a document locks it so that other editors cannot modify the document, and it retrieves a working copy of the document for editing. Because a document stored in Domino.Doc must be checked out for editing, choosing to edit a document also checks it out at the same time. You must also check out a document to submit it for review or approval, move it, delete it, or edit its profile or security information.

A document can only be checked out from the master file cabinet. For more information, see "Checking out a document from a non-master file cabinet from a browser" later in this chapter.

Procedure

To check out a document from the master file cabinet, perform the following steps:

1. From the Site Map, open the room, file cabinet, and then the binder that contains the document you want to check out. Alternatively, find the document you want to check out in one of the lists on your Home Page.

   Note You can search for your document if you don't know where it is stored.

2. To check out the document to edit it, open the document profile.

3. Choose Document from the toolbar.

4. Do one of the following:

   - Click Check Out Document to check out the document, locking it from other users.

   - Click Edit Document to check out the document and launch the application associated with it to modify the document now.

     If you are just getting started with Domino.Doc and your browser, you may get a security warning asking "What do you want to do with this file?" Select "Open it" then deselect "Open OLE server-in-place" in order to open the document for editing. If you do not want to display the message again, deselect "Always ask before opening this type of file."

   - Click Edit Profile to change the document title, type, or field attribute values.

   - Click Edit Security to change the Document Editor, Reader, Editor, or Manager list for this document, providing you have access.

   - Click Move to Binder to move the document to a different binder.

   - Click Return to Library if you want to return to the library and edit the document later.

5. When you have finished making your changes, check the document back in.

For more information, see "Checking in a document from a browser" later in this chapter.

Checking out a document from a non-master file cabinet from a browser

Checking out a document locks it so that other editors cannot modify the document, and it retrieves a working copy of the document for editing. Because a document stored in Domino.Doc must be checked out for editing, choosing to edit a document also checks it out at the same time. You must also check out a document to submit it for review or approval, move it, delete it, or edit its profile or security information.

A document can only be checked out from the master file cabinet. If you are not working in the master file cabinet you can connect to it if the server is accessible to you, or you can send a check-out request to the master file cabinet, depending on how the replica was configured. You must edit and check in the document on the same server from which you checked it out.

Procedure
To check out a document when you are not working in the master file cabinet, perform the following steps:

1. From the Site Map, expand the appropriate file room, and open the file cabinet and then the binder that contains the document you want to check out. Alternatively, find the document you want to check out in one of the lists on your Home Page.

   Note You can search for your document if you don't know where it is stored.

2. To check out the document to edit it, open the document profile.

3. Choose Document from the toolbar.

4. Do one of the following:

   - Click Check Out Document to check out the document, locking it from other users.

   - Click Edit Document to check out the document and launch the application associated with it to modify the document now.

     If you are just getting started with Domino.Doc and your browser, you may get a security warning asking "What do you want to do with this file?" Select "Open it" then deselect "Open OLE server in-place" in order to open the document for editing. If you do not want to display the message again, deselect "Always ask before opening this type of file."

A check-out request is sent to the master file cabinet replica, and you are given a provisional lock on the document and a working copy of the document for editing. You cannot check in the document until you receive the check-out lock from the master file cabinet.

- Click Edit Profile to change the document title, type, or field attribute values.
- Click Edit Security to change the Document Editor, Reader, Editor, or Manager list for this document, providing you have access.
- Click Move to Binder to move the document to a different binder.
- Click Return to Library if you want to edit the document later.

5. Do one of the following:

- Check in the document if your check-out request has been processed at the master file cabinet and you received the check-out lock.

  For more information, see "Checking in a document from a browser" later in this chapter.

- Retry or cancel the check-out request if your check-out request was rejected.

  For more information, see "Handling a document check-out rejection" in Chapter 6, "Working with Domino.Doc from the Notes Client."

- Resolve check-out conflicts if you were notified that the document has been changed by someone else since you requested the check-out lock.

  For more information, see "Resolving a document check-out conflict" in Chapter 6, "Working with Domino.Doc from the Notes Client."

Opening a document profile from a browser

To open a document profile from a list (Life Cycle, Checked Out Items, Favorites, or Recently Edited), click the Info icon next to the document title.

To open a document profile from a displayed binder's contents, do one of the following:

- If the file cabinet uses Notes folders to display its contents, click the document title.
- If the file cabinet uses the BinderTOC ActiveX control to display its contents, click the Info icon next to the document title.

Changing a document profile from a browser

You can change the contents of a document profile from a browser if you have the required access rights by checking it out, editing it, and checking it back in.

Your changes will be applied to all replicas of this file cabinet when replication occurs.

Procedure

To edit a document's profile information while working in a browser, perform the following steps:

1. Check out the document.
2. Open the working copy.
3. Choose Document - Edit Profile.
4. Change the document title, type, or field attribute values.
5. Click Save to save your changes.
6. Click Check In to check the document back in.

   The Check In dialog box displays.

   Note For more information, see "About checking in a document" in Chapter 5, "Working with Documents."
7. Select a Check In Option.
8. (Optional) Enter a comment or a description of your changes.
9. Click Save.

Changing document security from a browser

You can change the security settings on a newly created document, or on an existing document that has been checked out for editing.

Your changes will be applied to all replicas of the file cabinet that contains the document when replication occurs.

For more information, see "About document security" in Chapter 5, "Working with Documents."

Procedure

To change a document's security, perform the following steps:

1. Check out the document.
2. Open the working copy.
3. Choose Document - Edit Security.

4. Turn off the default list check box for the permission level you want to change.

   For example, to change the list of users who can edit the document, turn off "All binder editors and above."

5. Click Add/Remove.

6. To add groups or individuals to the access list, do the following:

   - To include an entire group, select the group from the drop-down box, and then click Add Group.

   - To include only some members of a group, select the group from the drop-down box, select the individual members you want in the "Selection list" box, and then click Add.

   - To include an individual user, select the user in the "Selection list" box, and then click Add.

7. To remove groups or individuals from the access list, select the names in the "Selected" box, and then click Remove.

8. Click OK.

9. Click Save to save your changes.

10. Choose Document - Check In to check the document back in.

11. From the Check In As dialog box, select a check-in option.

    Note For more information, see "About checking in a document" in Chapter 5, "Working with Documents."

12. (Optional) Enter a comment or a description of your changes.

13. Click Save.

Checking in a document from a browser

If you checked out a document and closed it without checking it back in, it remains locked and unavailable to others, except for viewing, until you check it in.

Note In order to check in a document from a non-master file cabinet, you must have received a check-out lock from the master file cabinet; you must check the document back in from the same non-master file cabinet from which you requested the check-out; and, you must resolve any check-out conflicts.

For more information about checking in a document, see Chapter 5, "Working with Documents."

Procedure

To check in the document, perform the following steps:

1. From the Checked Out Items pane, click on the info button on the document you want to check in.

    The Document Profile displays.

    Tip Alternatively, open the document and click on the working copy.

2. Choose Document - Check In.

3. From the Check In Options dialog box select an option.

    Note This dialog box will not display if your checked out document, document profile, or security has not been changed. The document will automatically be checked in at this point.

4. (Optional) Enter a description of your changes.

5. Click Save.

    The original file name for the document displays.

6. Enter the location for the document you are checking in by entering the complete path and file name in the Attach File box, or by clicking Browse to select the file.

Forwarding a document from a browser

You can forward a Domino.Doc document to one or more people by e-mail, if you have at least Editor access. You can forward the document, or a link, or both. The link option forwards a Notes doclink and a URL; the document option sends attachments, including view files.

Procedure

To forward a document perform the following steps:

1. Open the binder that contains the document you want to forward.

2. Open the document profile.

3. Choose Document - Forward.

4. In the memo form that opens, use the header fields (To:, cc:, bcc:) to enter the complete e-mail address of the person (or persons) you want to forward the document (or documents) to. Click on the "People" icon next to any of the header fields to select recipients from the Domino directory.

5. Change the subject of the memo, if you don't want to use 'Domino.Doc:' followed by the document name.

6. (Optional) Enter additional comments.

7. Select "Send file as link" and/or "Send file as attachment."

8. Click Send to send the selected item or items.

Bookmarking a document

You can create a link to a document, called a bookmark, in a binder. In this way, you can make it easy to access a document from more than one binder without maintaining duplicate copies of the document.

Procedure
To create a document bookmark, perform the following steps:

1. Open the file cabinet and binder that contains the document you want to link to.
2. Access the document profile of the current draft or version of the document you want to link to.
3. Click Copy Bookmark to Binder.

   The Select Binder dialog box displays.
4. Choose the binder you want to copy the document bookmark into.

Deleting a bookmark
To delete a bookmark in a binder that uses the BinderTOC ActiveX control for its table of contents design, click the Document-to-trash-can icon (shown below) that appears next to the bookmark.

Deleting a document from a browser

Certain restrictions apply to deleting documents. For more information, see "About deleting documents" in Chapter 5, "Working with Documents."

Procedure
1. Select the document from any list.
2. Click the Info icon to open the profile.
3. Choose Document - Delete Document.
4. At the prompt, select an option and click OK.

Submitting a document for review

From the browser you can set up a document for review, manage the review cycle, and perform the review. When the review cycle is complete, the initiator can delete the review copies and all edits and comments associated with them.

A document can be submitted to a review process, providing that the review option is not disabled on the document type form. Any draft document can be submitted to the review process. If the document you want reviewed is currently a version, you'll have to check it out. When you submit it for review, it is put into draft state.

Document reviewers are notified by e-mail that they are to review the document. The review can be done from any of the Domino.Doc user interfaces, including from the browser. Depending on how the review cycle was set up, the reviewers will be able to add comments, edit the content, or both. The notification contains a link to the document that the reviewer can access by simply clicking on it.

In a serial review, all reviewers edit and/or comment on the document in sequence in the order established by the initiator. In a parallel review, each reviewer edits and/or comments on the document at the same time.

As review initiator, you can add reviewers to the reviewer list, or change the list of reviewers , after setting up the review.

As review initiator, you can also cancel the review cycle.

When the review is complete, you can consolidate the review comments.

For details, see the following procedures in this section.

Procedure

To initiate a review cycle, perform the following steps:

1. Open the file cabinet and binder that contains the document you want reviewed.

2. Check out the document.

3. Open the document profile, and choose Submit for Review from the Document menu.

    Note If you are working in a non-master file cabinet, you first have to check out the current draft.

    The Review Options form displays.

4. Specify the document reviewers:

    - Choose All Draft Editors if you want all draft editors to review the document.

    - Choose All Document Managers if you want all document managers to review the document.

    - Or select specific reviewers.

    Note The list of reviewers included in "All Draft Editors" and "All Document Managers" is determined by the document's security settings. For example, only users who are listed as a document manager in the security settings are included in the life cycle process when "All Document Managers" is selected; users who are invited to the file cabinet as managers are not included. Likewise, managers who appear in the Selection List in the Review Options form are not automatically included when "All Document Managers" is selected.

5. Specify the routing type:

   - Choose serial if you want each reviewer to review the document in sequence in the order established by the initiator.

   - Choose parallel if you want each reviewer to review the document at the same time.

6. Specify a time limit option:

   - Choose "Send reviewer a reminder after time limit expires," then enter the number of days to allow.

   - Choose "Send originator a notification after time limit expires," then enter the number of days to allow.

7. Indicate whether to notify the review originator after the final review or after each review.

8. Indicate what kinds of edits the reviewers can make: comments only or content.

9. (Optional) Enter a message to the reviewers.

10. Click Save.

Specifying document reviewers

When you are setting up a document review, you need to specify who should review the document. To specify reviewers other than "All Draft Editors" and "All Document Managers," you can use the Select Reviewers dialog. For example, you may want to select only certain members of a group.

Procedure

Access the Select Reviewers dialog box and do the following:

1. Select a group.

   The names of the group members display in the Selection list.

2. Do one of the following:

   - Click Select All if you want all members of the group to review the document.

   - Select individuals to review the document.

   Click Deselect All to clear your selections.

3. Click Add when you have selected the appropriate document reviewers.

   The names you specified appear in the Added list.

4. (Optional) If you chose the Routing Type "Serial," select a name and click Move Up or Move Down until the reviewer appears in the proper sequence in the list. Repeat until the names in the list appear in the order in which you want them to review the document.

5. Click Save.

Changing the document reviewer list

After submitting a document for review, the review initiator can change the order of the reviewers, and can add and remove reviewers who have not yet reviewed the document. If, for example, you included someone who is on vacation and won't be back within the review cycle, you may want to remove that person and add someone else.

Procedure

To change the document reviewer list, perform the following steps:

1. Use the Site Map to open the room, file cabinet and binder that contains the document, or select the document from the Life Cycle pane.

2. Open the document profile.

3. Scroll to the Review Status section and click Edit Reviewers.

4. Add, remove, and move reviewers as necessary.

   Note   You cannot remove from the list a user who has already reviewed the document.

5. Click OK.

Canceling a review cycle

The review initiator (or a manager of the file cabinet) may cancel a review cycle any time during the review process prior to Review Complete. Canceling a review returns the document to the authoring state and preserves existing review edits and comments until the document is resubmitted for review.

To cancel a review, open the document and click Cancel Review.

Consolidating review comments

Review comments are added and stored on a Review Copy document, a response document to the draft being reviewed. In a parallel review, each reviewer creates and edits a separate review copy. After the review cycle is complete, the initiator or any other draft editor must decide how to consolidate or incorporate the review edits and comments.

You can copy the review copy into the checked out draft, providing the draft status is Review Complete.

Alternatively, you can check out the current draft and enter all of the edits and comments, or you can create a new draft based on one of the review copies.

Procedure
To import the review copy into the current draft, perform the following steps:

1. Check out the draft.

2. Click Import Review Copy.

   If there is only one review copy, it will be copied into the draft.

   If there are multiple review copies, the list of review copies displays. Select the one you want to copy and click OK.

Reviewing a document from a browser
Reviewers can review a document from the browser, editing content or entering comments, as specified by the person who submitted it for review. Documents in review apear in the Life Cycle pane.

For more information, see "About the document review cycle" in Chapter 5, "Working with Documents."

Procedure
To review a draft document, perform the following steps:

1. From the library, click Life Cycle in the My Documents section, or go to My Home Page and see the Life Cycle pane.

   A list of documents and their current life cycle status displays.

2. Select the document and open the document profile.

3. Click Open Review Copy.

   What you can do depends on how the review cycle was set up. Perform either or both of the following actions:

   - Edit the content.

   - Enter a comment.

4. If you have saved your review copy locally on your hard disk, click Attach File, enter the path and file name (or click Browse to select the file), then click Save.

5. Click Complete Review from the draft document when you have finished editing or commenting on the document.

   If others need to review the document, the document state remains In Review and the document is routed to the next reviewer.

If you are the final reviewer, the document state is changed to Review Complete and the document review initiator is notified.

Note Once a review is complete, the review copy can be viewed, but not edited.

Submitting a document for approval

A draft document can be routed for approval, providing that the approval option is not disabled on the document type form. If a review cycle is required for the document, the document state must be "Review Complete." Document approvers are notified by e-mail that they are to approve or reject the document when you complete this procedure.

The document approvers can perform the approval process from any of the Domino.Doc user interfaces, including the browser.

As initiator of the approval process, you can add approvers to the list, change the list, or cancel the approval cycle.

For details, see the following procedures in this section.

Procedure

To submit a document for approval, perform the following steps:

1. Open the document profile, and choose Submit for Approval from the Document menu.

   Note If you are working in a non-master file cabinet, you'll first have to check out the current draft.

2. Specify the document approvers:

   • Choose All Draft Editors if you want all draft editors to approve the document.

   • Choose All Document Managers if you want all document managers to approve the document.

   • Or select specific approvers.

   Note The list of approvers included in "All Draft Editors" and "All Document Managers" is determined by the document's security settings. For example, only users who are listed as a document manager in the security settings are included in the life cycle process when "All Document Managers" is selected; users who are invited to the file cabinet as managers are not included. Likewise, managers who appear in the Selection List in the Approval Options form are not automatically included when "All Document Managers" is selected.

3. Specify the routing type:

- Choose serial if you want each approver to approve the document in sequence in the order established by the initiator.

- Choose parallel if you want each approver to approve the document at the same time.

4. (Optional) Specify a time limit option:

- Choose "Send approver a reminder after time limit expires," then enter the number of days to allow, or deselect this option.

- Choose "Send originator a notification after time limit expires," then enter the number of days to allow, or deselect this option.

5. Indicate whether to notify the approval originator after the final approval or after each approval.

6. Indicate what to do on approval completion: check in as a new version, check in and replace current version, or return to the initiator.

7. Click Save.

Note If a document is rejected, it cannot be immediately resubmitted for approval because Domino.Doc assumes that the document needs further revision. To resubmit the document for approval when no further changes are required, first check out the document, click any of the Edit options (for example, Edit Document, Edit Profile, or Edit Security), and then check in the document as a draft.

Specifying document approvers
When you are setting up a document approval cycle, you need to specify who should approve the document.

Procedure
To specify approvers other than All Draft Editors and All Document Managers, (for example, all or select members of a group), choose Approvers from the Setup Approval form and do the following:

1. Select a group.

   The names of the group members display in the Selection list.

2. Do one of the following:

- Click Select All if you want all members of the group to approve the document.

- Select individuals to approve the document.

   Click Deselect All to clear your selections.

3. Click Add when you have selected the appropriate document approvers.

   The names you specified appear in the Added list.

4. (Optional) If you chose the Routing Type "Serial," select a name and click Move Up or Move Down until the approver appears in the proper sequence in the list. Repeat until the names in the list appear in the order in which you want them to approve the document.

5. Click OK.

Changing the document approver list

After submitting a document for approval, the review initiator can change the order of the approvers, and can add and remove approvers who have not already approved the document. If, for example, you included someone who is on vacation and won't be back within the review cycle, you may want to remove that person and add someone else.

Procedure

To change the document approver list, perform the following steps:

1. Open the file cabinet and binder that contains the document.

2. Double-click the document to access the document profile.

3. Scroll to the Review Status section and click Edit Approvers.

4. Add, remove, and move approvers as necessary.

   Note   You cannot remove from the list a user who has already approved the document.

5. Click OK.

Canceling an approval cycle

The approval initiator (or a manager of the file cabinet) may cancel an approval cycle any time while the document is in the Pending Approval state. Canceling an approval returns the document to the previous state and preserves existing approval comments. To cancel an approval cycle, simply open the approval copy and click Cancel Approval.

Approving and rejecting a document

If you are a document approver the document will appear in your Life Cycle pane when working with Domino.Doc from a browser. You can approve or reject the document. Reading the content is optional.

Procedure

To approve or reject a document in an approval cycle, perform the following steps:

1. Select the document you want to approve from the Life Cycle list.

2. (Optional) Click Document - View if you'd like to read the document content.

3. Do one of the following:

   • Click Document - Approve.

   If others need to approve the document, it remains in the Approval state and is routed to the next approver.

   If you are the final approver, the document state is changed to Approved and is either returned to the approval initiator, checked in as a new version, or checked in to replace the current version depending on how the approval cycle was set up.

   • Click Document - Reject.

   The approval cycle ends and the document state is changed to Rejected.

Note If the document is rejected, it cannot be immediately resubmitted for approval because Domino.Doc assumes that the document needs further revision. To resubmit the document for approval when no further changes are required, first check out the document, click any of the Edit options (for example, Edit Document, Edit Profile, or Edit Security), and then check in the document as a draft.

Manually archiving a document from a browser

A document can be archived from the master file cabinet only. Also, a document can be archived only if the System Administrator set the Document Type to allow archiving.

For more information, see "About archiving documents" in Chapter 5, "Working with Documents."

Procedure

To manually archive a document from a browser, perform the following steps:

1. Open the document that you want to archive.

2. Select Document - Mark for Archive.

   The Archiving Options display.

3. Specify an archiving option for the document versions:

- Archive all versions.
- Archive all versions except the most recent.
- Archive only the selected version.

4. Specify an archiving option for the document drafts:

- Leave drafts alone.
- Archive drafts when a version is archived.
- Delete drafts when a version is archived.

5. Specify an archive directory.

6. Click Save.

Note This procedure marks the document for archiving; however, it is not archived until the archiving agent is run.

Using the Discussion feature in the browser

When you are working with Domino.Doc from the browser you can use the Discussion feature to communicate with other users of a document. The Discussion feature has two options: Who is Online and Forum. They allow you to create discussion topics and responses for Domino.Doc documents, and if Sametime integration is enabled, to use Sametime to communicate with other online users of the document.

For more information, see "About discussing documents in the Forum" in Chapter 5, "Working with Documents."

Using the Who is Online feature
If Sametime Integration is enabled for both your Domino.Doc library and for the file cabinet containing the document or binder you have open, you can use Sametime to communicate with other users.

1. Choose Discussion - Who Is Online on the action bar.

   A window opens with a list of who is online with Sametime.

2. Double-click to select a name and initiate a chat.

3. Right-click to get the option for a single chat or to invite all users.

A floating Sametime window opens that you can use for Sametime operations. The icons and general capabilities follow the Sametime conventions. However, the list of Sametime users is limited to those persons who have Manager or Editor access to the document, and is categorized by managers, editors, reviewers, and approvers insofar as those categories are populated.

Using the Discussion Forum feature
You can use the Forum feature to initiate a discussion forum around a document, or to add a topic to an existing discussion thread, and to read the discussion documents that have evolved. The visibility of topics and responses is limited to the user's access to the related document. For example, if only Draft Editors have access to a document, you will not see the discussion unless you have Draft Editor status.

Navigating the Discussion thread
With a discussion forum open, you can view the entire discussion thread on a document. It allows you to view all main topics and responses, insofar as your user security level allows. A navigation display is included for every main topic and response. This display shows a maximum of 21 documents at a time, arranged in a topic-and-response hierarchy, with the current document approximately in the center. (Its position depends on how close the current document is to the very beginning or very end of the thread.)

To navigate through the discussion:

- Use the scroll sliders or arrows to scroll through the entire thread. It displays 21 documents at a time.

- Double-click any discussion document link to open the topic or response document.

- Click the buttons on the toolbar as follows:

  - **Return** to go back to the document view.

  - **New Main Topic** to create a new topic in the thread.

  - **New Response** to create a response to an existing topic or response.

  - **View Main Topics** to open a pop-up window that shows links for all main topics in the thread. Clicking a link in the pop-up window displays the selected topic, or response, and closes the pop-up window.

  - **Delete** to delete every discussion document in the thread, or just the current document. Deleting the current document also deletes all of its response documents.

  Note Only managers of the related Domino.Doc document (Discussion Document Managers) can use the delete option.

  - **Search** to enter a search query to find a particular discussion document in a thread. You can search for text only in the discussion document's subject field and the document content. Search results display in a new page where you can either perform a new search, or view the search results. Each search result is a link that you can click to open the selected document.

  - **Refresh** (circling arrows) to update the view.

Creating the first main topic for a discussion forum
When a Domino.Doc document is initially created it has no related discussion documents, and will not have any until you create one. This could be immediately after document creation or at any time thereafter.

To create the first main topic perform the following steps:

1. Select the document you want to discuss by clicking on its info button to open the profile.

2. Choose Discussion - Create Forum Topic.

3. Enter a subject for the topic, and your comments, in the boxes provided.

4. Click Save to create the topic.

5. Click Return to return to the document view.

    The document profile now shows an icon and a link to Go to Forum.

You can also create a topic by choosing Discussion - Create Forum Topic when you have a document's Security, Revision History, or Activity Log open.

Opening a discussion thread and adding topics or responses
If a forum has been started on a document, you can create a new topic, or respond to a topic already in the discussion thread. You can get to the forum from all document views: Profile, Security, Revision History, or Activity Log.

Selecting Go to Forum opens the newest main topic that was created for this document. From the forum you can view the entire discussion thread, including all main topics and responses, (insofar as your user security level allows).

Note Responses cannot be nested to a depth greater than 32.

To add a topic or response to a forum:

1. Open a binder and select the document being discussed.

2. Open the document profile.

3. Choose Discussion - Go to Forum, or click the Go to Forum link.

4. To add a new topic click the New Main Topic button.

5. To add a response select a topic or response and click the New Response button.

6. Enter the topic subject and your comments in the space provided.

7. Click Save to create the topic.

8. Click Return to return to the document view.

Chapter 8
Working with Domino.Doc from
an Integrated Application

This chapter describes how to navigate the Domino.Doc library, open and save documents, and manage the contents of Domino.Doc file cabinets from an integrated application.

- About working with integrated applications
- Managing library connections from an Office application
- Managing library connections from an ODMA-supported application
- Navigating Domino.Doc from an integrated application
- Working with libraries from an integrated application
- Working with file cabinets from an integrated application
- Working with binders from an integrated application
- Working with documents from an integrated application
  - About adding documents to the library
  - Saving new documents from an integrated application
  - Adding existing documents to Domino.Doc
  - Creating a binder when adding documents to Domino.Doc
  - Specifying document profile data
  - Setting document security
  - About finding and opening documents
  - Finding a previously accessed document
  - Searching for a document to open
  - Opening documents from within an integrated application
  - Viewing a document's revision history
  - Editing documents from an integrated application
  - Editing a checked-out document later
  - Editing a document profile from an integrated application
  - Working with Domino.Doc properties in Office documents
  - Checking in documents through an integrated application

- Reviewing documents from an integrated application
- Approving and rejecting documents from an integrated application

About working with integrated applications

If you have the Domino.Doc Desktop Enabler installed on your PC, it automatically intercepts any request to open or save a document from any of the integrated applications that you specified for use with Domino.Doc. You can open, edit, and save documents using either your computer's local file system or a Domino.Doc library, without ever leaving the application.

For more information, including which applications Domino.Doc supports, see "About Domino.Doc and integrated applications" in Chapter 1, "Introducing Domino.Doc."

Working with Microsoft Office applications

When you open and save files in Microsoft Word, Excel, and PowerPoint, you use Domino.Doc dialog boxes that look like the native Microsoft application dialog boxes. For Word and PowerPoint, you can choose whether to use the Domino.Doc dialog boxes or standard ODMA dialog boxes.

For more information, see "Specifying applications to use with Domino.Doc" in Chapter 2, "Getting Started."

In addition, when you edit a Microsoft Office document, you can choose whether to include Domino.Doc information such as the revision number or library name when you view the document's properties. For more information, see "Working with Domino.Doc properties in Office documents" later in this chapter.

Working with other ODMA-supported applications

When you work in other ODMA-supported applications such as Lotus Word Pro or Microsoft PhotoDraw, the Open and Save As dialog boxes follow a common ODMA standard.

Connecting to the library

When you connect to a library to open or save documents in your integrated application, you need to specify the library address and display name. The library address includes the name of the Domino server where the library resides, and the library file name. The display name is simply the text that will be assigned to the library icon. You do not need to specify the exact library name.

Domino.Doc libraries can be accessed through either HTTP protocol or Lotus Notes protocol.

The address syntax for your server and library is:

`Protocol://Server name/Domino.Doc Library Name`

For example:

- http://myHTTPServer/librarynameLIB.nsf

  Note If your Domino Web Server uses a port other than 80 for HTTP, use the following address syntax:

  `http://myHTTPServer:port/librarynameLIB.nsf`

- https://myHTTPServer/librarynameLIB.nsf

- Notes://myNotesServer/librarynameLIB.nsf

  Note The address syntax for a hierarchical Notes server is:

  `Notes://myNotesServer/subdirectory/librarynameLIB.nsf`

If you are not sure of your server or library name, consult your Domino.Doc Administrator.

After you connect to a library, you can open and save documents in the appropriate Domino.Doc file cabinet and binder. The previously selected protocol is remembered and used the next time you work in your integrated application.

For more information, see "Managing library connections from an Office application" and "Managing library connections from an ODMA-supported application" below.

Managing library connections from an Office application

After you specify the applications you want to use with Domino.Doc, follow the steps below to set up the library connections you need.

If you are using either a Microsoft Office application that is set to use ODMA dialog boxes, or another application, see "Managing library connections from an ODMA-supported application" below.

Creating a library connection

1. Choose File - Open.

   The Open dialog box displays the files or folders on your local drive.

2. To navigate to the top level of the Domino.Doc Neighborhood where you can see the current library connections, click the Domino.Doc icon in the location bar.

   If there are no current library connections, the Library Connect dialog box displays. To create a library connection, continue to step 3.

   If there are one or more library connections, the Open dialog box displays a library icon for each connection.

3. In the Library Connect dialog box, do the following:

   - Enter the address of the library you want to access, or select a previously accessed library from the drop-down box.

   - Enter the name you want to assign to the library icon. (You do not need to enter the exact name of the library.)

   - Click OK.

   After you connect to a library, the Open dialog box displays the library icon with the display name you specified.

4. To create an additional library connection, do the following:

   - Click the Domino.Doc icon in the location bar and then click the Create New Folder icon in the toolbar.

   - When the Library Connect dialog box displays, specify the library address and name, and then click OK.

5. If prompted, enter your user name and password, and then click OK.

   Tip   To avoid being prompted for your Notes password, do the following: from your Notes workspace, choose File - Tools - User ID, and check the Basics option "Don't prompt for a password from other Notes-based programs."

For more information on how to explore the Domino.Doc Neighborhood, see "Navigating Domino.Doc from an integrated application" in this chapter.

For information on setting up automatic library connections by modifying the client registry, see the *Domino.Doc Administrator's Guide.*

Editing a library connection
After connecting to a library, you can edit the connection properties to change the library address or display name.

1. Choose File - Open.

2. If needed, click Domino.Doc in the location bar to see the current library connections.

3. Right-click the library whose connection you want to edit, and then choose Properties from the context menu.

4. (Optional) Edit the library address.

5. (Optional) Edit the library display name.

6. Click OK.

Note   If you are using Domino.Doc on Windows NT, 2000, or XP, you can edit only those library connections that you created.

Disconnecting a library

After you disconnect from a library, the associated icon no longer displays in the dialog box.

1. Choose File - Open.

2. If needed, click Domino.Doc in the location bar to see the current library connections.

3. Right-click the library you want to disconnect, and then choose Disconnect Library from the context menu.

Note   If you are using Domino.Doc on Windows NT, 2000, or XP, you can disconnect only those library connections that you created.

Managing library connections from an ODMA-supported application

After you specify the applications you want to use with Domino.Doc, follow the steps below to set up the library connections you need.

If you are using a Microsoft Office application that is set to use Domino.Doc Office dialog boxes, see "Managing library connections from an Office application" above.

Creating a library connection

1. Choose File - Open.

   If there are no current library connections, the Library Connect dialog box displays. To create a library connection, continue to step 2.

   If there are one or more library connections, the Open dialog box displays either the current library connections or the contents of the last place you visited in the Domino.Doc Neighborhood. Skip to step 3 for information on how to view the available connections and if needed, create a new library connection.

2. In the Library Connect dialog box, do the following:

   • Enter the address of the library you want to access, or select a previously accessed library from the drop-down box.

   • Enter the name you want to assign to the library icon. (You do not need to enter the exact name of the library.)

   • Click OK.

   After you connect to a library, the Open dialog box displays the library icon with the display name you specified.

3. To navigate to the top level of the Domino.Doc Neighborhood where you can see the current library connections, click the Domino.Doc icon in the location bar.

4. To create an additional library connection, do the following:

- Click the Domino.Doc icon in the location bar and then click the Create New Folder icon in the toolbar.

- When the Library Connect dialog box displays, specify the library address and name, and then click OK.

5. If prompted, enter your user name and password and then click OK.

   Tip   To avoid being prompted for your Notes password, do the following: from your Notes workspace, choose File - Tools - User ID, and check the Basics option "Don't prompt for a password from other Notes-based programs."

For more information on how to explore the Domino.Doc Neighborhood, see "Navigating Domino.Doc from an integrated application" in this chapter.

For information on setting up automatic library connections by modifying the client registry, see the *Domino.Doc Administrator's Guide.*

Setting a default library

The Favorites, Checked Out, and History buttons in the ODMA dialog box use the default library if you don't already have a library open. For example, if you have several library connections and choose File - Open, you can click Favorites in the location bar to automatically open the default library and navigate to the Favorites folder.

1. Choose File - Open.

2. Right-click the icon of the library that you want as your default library.

3. Choose Set as Default Library.

If you don't specify a default library, the first library you connect to becomes the default.

For information on setting the default library by modifying the client registry, see the *Domino.Doc Administrator's Guide*.

Editing a library connection

After connecting to a library, you can edit the connection properties to change the library address or display name.

1. Choose File - Open.

2. Right-click the library connection you want to edit, and then choose Properties from the context menu.

3. (Optional) Edit the library address.

4. (Optional) Edit the library display name.

5. Click OK.

Note If you are using Domino.Doc on Windows NT, 2000, or XP, you can edit only those library connections that you created.

Disconnecting a library

After you disconnect from a library, the associated icon no longer displays in the dialog box.

1. Choose File - Open.

2. Right-click the library you want to disconnect, and then choose Disconnect Library from the context menu.

Note If you are using Domino.Doc on Windows NT, 2000, or XP, you can disconnect only those library connections that you created.

Navigating Domino.Doc from an integrated application

When working in Microsoft Office and other integrated applications, you access Domino.Doc libraries through the dialog box that displays when you choose File - Open or File - Save As.

Accessing Domino.Doc from a Microsoft Office application

When you use a Microsoft Office application that you specified for use with Domino.Doc, you see a Domino.Doc dialog box that looks very similar to the Office application dialog box and lists the files and folders on the local drive.

If you are using Word or PowerPoint, you can choose whether to have the Open and Save As dialog boxes use the Domino.Doc Office interface (which resembles the native application dialog boxes) or a standard ODMA interface.

For more information, see "Specifying applications to use with Domino.Doc" in Chapter 2, "Getting Started."

Accessing Domino.Doc from an ODMA-supported application

When you use an ODMA-supported application such as Lotus Word Pro (or an Office application that is set to use the ODMA interface), you see a standard ODMA dialog box that lists the contents of the Domino.Doc Neighborhood.

Exploring the Domino.Doc Neighborhood hierarchy

When you access Domino.Doc through the Open dialog box or the Save As dialog box, you see the icons below, depending on where you are in the hierarchy:

Domino.Doc Neighborhood

Domino.Doc Library

File Room

File Cabinet

Binder Category, or sub category

Binder

You can use these additional icons for quick access to the files you use most frequently:

 Click Favorites to access your favorite documents.

 Click Checked Out to access documents that are checked out to you.

 Click History to access recently edited documents.

 Click Search to search for documents that contain a particular word or phrase.

You can navigate the Domino.Doc Neighborhood in the dialog box using the standard mouse and keyboard conventions summarized below.

Using the mouse

- Double-clicking on a library, file room, file cabinet, category, or binder opens it for exploration.
- Double-clicking on a document opens it for editing.
- Right-clicking on an item accesses its context menu.

Using the keyboard

You can navigate the Domino.Doc Neighborhood and perform menu commands using the keyboard:

- To move to the previous item, press the Up arrow.
- To move to the next item, press the Down arrow.
- To refresh the display, press F5.
- To open a selected item, press ENTER.
- To access the context menu for a selected item, press either SHIFT+F10 or the Application key (located next to the CTRL key). Then press the underlined letter of the menu command you want to perform.

Using the toolbar

Use the toolbar buttons across the top of the dialog box to go back to the last folder you visited, search the Web, navigate up the Domino.Doc Neighborhood hierarchy (or up the file hierarchy on the local disk), view the Desktop, create a new library connection, or display the View menu and Tool menu.

If you are using Domino.Doc on Windows 98, you see a toolbar like the one shown here. You may notice slight differences in the available icons depending on the operating system and application you are using.
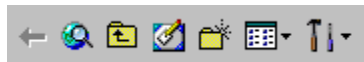
Note   You can display the View menu and the Tool menu whether the dialog box uses the Domino.Doc Office interface or the standard ODMA interface. However, if you are using a Microsoft Office application with the Domino.Doc Office interface, the View menu and Tool menu list only those commands that Domino.Doc supports. In addition, some commands work differently depending on whether you are in the Domino.Doc Neighborhood or the local file system. For example, if you select a document in a Domino.Doc binder, and then choose Properties from the Tool menu, you see the Domino.Doc Properties dialog box. If you select a document in your local file system, and then choose Tool - Properties, you see the Office application dialog box.

Using the location bar in the Domino.Doc Office dialog box

The location bar along the left side of the Open dialog box and Save As dialog box contains additional shortcuts for quick access to the files and locations you use most frequently.

If you are using a Microsoft Office application with the Domino.Doc Office interface, you can use these icons in the location bar:

Click History to access recently edited documents.

Click My Computer to display files and folders in the local file system.

Click Desktop to display files and folders on the computer desktop.

Click Favorites to access most frequently used files and folders.

Click Domino.Doc to list available libraries in the Domino.Doc Neighborhood.

Using the location bar in the ODMA dialog box

If you are using an integrated application such as Lotus Word Pro (or an Office application that is set to use the ODMA interface), you can use these icons in the location bar:

Click Favorites to access favorite documents in the currently selected library (or in the default library, if no library is selected).

Click Checked Out to access files that are checked out to you from the currently selected library (or from the default library, if no library is selected).

Click History to access recently edited files in the currently selected library (or in the default library, if no library is selected).

Click Domino.Doc to list available libraries in the Domino.Doc Neighborhood.

Click My Computer to display files and folders in the local file system and end the ODMA session.

Note For information on hiding the My Computer icon to prevent access to the local file system, see the *Domino.Doc Administrator's Guide*.

Working with libraries from an integrated application

You can have multiple library connections and switch from one to another by clicking the connection you want.

For more information about connecting libraries, see "Managing library connections from an Office application" and "Managing library connections from an ODMA-supported application" earlier in this chapter.

If you are using a Microsoft Office application, choose File - Open (or File - Save As), and then click the Domino.Doc icon in the dialog box to see the available library connections in the Domino.Doc Neighborhood. Select the library connection that you want, to see the file rooms, file cabinets, binder, and documents.

If you are using a different integrated application, choose File - Open (or File - Save As) to see the contents of the available library connections in the Domino.Doc Neighborhood.

You can right-click on a library connection in either the Open dialog box or the Save As dialog box and use the commands listed below.

Choose this command:	To do this:
Open	Display all rooms for the selected library in the dialog box.
Explore	Display all rooms for the selected library in a separate window.
Set as Default Library	Make the selected library the default.
Disconnect Library	End the library connection.
Refresh	Refresh the display.
Properties	Update the URL for a Domino.Doc library or edit the displayed library name.

Working with file cabinets from an integrated application

You can right-click on a file cabinet in either the Open dialog box or the Save As dialog box and use the commands listed below.

Choose this command:	To do this:
Open	Display all binder categories for the selected file cabinet.
Explore	Display all binder categories for the selected cabinet in a separate window.
Refresh	Refresh the display.
New Binder	Create a new binder (categorized or non-categorized).

Note You cannot create, delete, or move a file cabinet in an integrated application. These are administrative functions that must be performed from the Notes Client by a Domino.Doc Administrator.

Working with binders from an integrated application

You can right-click on a binder in either the Open dialog box or the Save As dialog box and use the commands listed below.

Choose this command:	To do this:
Open	Display all documents for the selected binder.
Explore	Display all documents for the selected binder in a separate window.
Refresh	Refresh the display.
New Document	Add a new Domino.Doc document to the library using an existing file from a file system directory.
Delete	Delete the selected binder. If there are no other binders in the current category (or sub category), the category (or sub category) will be deleted as well.
Properties	View information about the binder's profile and security settings.

Working with documents from an integrated application

When you right-click on a document in either the Open dialog box or the Save As dialog box, the commands that appear on the context menu change depending on the document's current state. The list may include any of the commands described below.

Choose this command:	To do this:
Edit	Open the document for editing if you have it checked out. If it is not checked out, it will be checked out transparently and opened for editing. You must have Editor access rights to the document.
View	Open the selected document for viewing. Documents created in the Notes client or the browser client display in the dialog box if they have an attachment. (This option is not available if the document is checked out.) You can view documents, drafts, or versions.

Choose this command:	To do this:
Print	Print the selected document. You can print documents, drafts, or versions.
Check Out	Open the document and lock out other users from accessing it, other than for viewing. Creates a working copy. You must have Editor access rights to the document. (This option is not available unless the document is checked in.)
Check In	Return the document to the library, optionally replaced or versioned. Unlocks the document so other users can access it. (This option is not available unless the document is checked out.)
Complete Review	Finish editing or commenting on the selected file. If others need to review the document, it is routed to the next reviewer. If you are the final reviewer, the document is either returned to the review initiator or checked in as a new draft or version, depending on how the review cycle was set up.
Approve	Approve the selected document. If others need to approve the document, it remains in the Approval state and is routed to the next approver. If you are the final approver, the document is either returned to the approval initiator, checked in as a new version, or checked in to replace the current version, depending on how the approval cycle was set up.
Reject	Reject the selected document and end the approval cycle.
Add to Favorites	Add the selected document to your favorites list for easy access.
Remove from Favorites	Remove the selected document from the favorites list. (This option is available only when you select the document from within the favorites list.)
Copy Bookmark to Binder	Create a bookmark to the selected document in a binder to which you have Editor access.
Move to Binder	Move the selected document to a binder to which you have Editor access. You must have Manager access to the document. **Note** This function can be performed only in the master file cabinet replica.
Add to Attache Case	Make the document available for offline use. You must use the Explorer to work with the Attache Case. For more information, see "Working with the Attache Case" in Chapter 9, "Working with Domino.Doc from Windows Explorer."

Choose this command:	To do this:
Delete	Delete the document from the binder. You must have Manager access to the document and Editor access to the binder.
Revision History	Display the document's revision history and view a previous revision.
Properties	Display the security and profile information. You can change the properties only if the document is checked out to you.
Version x.x	View, print, or display the properties for the version (rather than for the most recent draft). **Note** This command is available if the selected document's revision history includes a draft (to which you have access) that was created after a version.

About adding documents to the library

You can add a document to a Domino.Doc library in several ways from an integrated application. This section describes:

- Saving a new document
- Adding an existing document
- Creating a new binder when adding a document

You can add only one document at a time using these methods. If you want to capture several documents, you can use File - Import, available through Notes.

You must have at least Editor access to the file cabinet and binder where you want to put the document.

Saving new documents from an integrated application
To save a document to a Domino.Doc library from an integrated application, you must have the application selected in the Desktop Administrator.

After you create a new document in an integrated application, you can save it to the Domino.Doc library or to your own file system. If you save the document to the local file system, it will not be available to you through the Domino.Doc library. You can, however, add it to the library later.

Saving a new document to a Domino.Doc library
1. After you create the document in your integrated application, choose File - Close.
2. Open the library where you want to save the document.

3. If you are prompted for a user name and password, enter the information and then click OK.

4. Open the file room, file cabinet, and binder where you want to save the document.

5. Enter a name in the "File name" box.

   Note The file name cannot include any of the following characters: \ / : * ? " < > |

6. (Optional) Select a different file format from the "Save as type" list.

7. Click Save.

   The Domino.Doc Check In dialog box displays.

8. Specify the document profile data.

9. Set the document security.

10. In the Domino.Doc Check In dialog box, do the following:

    • Make sure "Check In?" is set to Yes.

    • Select a check-in option.

    • (Optional) Enter a comment or description.

11. Click OK.

Saving a new document to the local file system

If you aren't ready to save a new document to a Domino.Doc library, you can save the document to the local file system on your computer.

1. After you create the document in your integrated application, choose File - Close.

2. If you are prompted for a Domino.Doc library user name and password, click Cancel.

3. Do one of the following:

   • If the dialog box lists the contents of the local drive, open the folder where you want to save the document.

   • If the dialog box lists the contents of the Domino.Doc Neighborhood, click My Computer, and then open the folder where you want to save the document.

4. Enter a name in the "File name" box.

   Note When specifying a file name, avoid using the following invalid characters: \ / : * ? " < > |

5. (Optional) Select a different file format from the "Save as type" list.

6. Click Save.

Adding existing documents to Domino.Doc

You can save an existing file that was created in an integrated application to a Domino.Doc library from within the application.

Procedure

1. After you make any needed changes to the document in your integrated application, choose File - Save As.

2. Open the library where you want to save the document.

3. If you are prompted for a user name and/or password, enter that information and then click OK.

4. Open the file room, file cabinet, and binder where you want to save the document.

5. Enter a name in the "File name" box.

    Note The file name cannot include any of the following characters: \ / : * ? " < > |

6. (Optional) Select a different file format from the "Save as type" list.

7. Click Save.

    The Domino.Doc Check In dialog box displays.

8. Specify the document profile data.

9. Set the document security.

10. In the Domino.Doc Check In dialog box, do the following:

    *   Make sure "Check In?" is set to Yes.

    *   Select a check-in option.

    *   (Optional) Enter a comment or description of your changes.

11. Click OK.

Creating a binder when adding documents to Domino.Doc

When working in an integrated application, you can create a new binder in a file cabinet when you create and save a new document. The new binder will be added to all replicas of the file cabinet when replication occurs.

When creating a binder, you may be prompted by Domino.Doc to change the name of the binder, if it finds another binder with the same name. You can accept the duplicate name, or make a name change.

If the file cabinet profile specifies Notes folders for the binder Table of Contents, and if you are not an Administrator, the Table of Contents for the binder may not get created immediately.

If you need to change the binder profile or security information later, you'll have to check the binder out for editing from a browser or Notes. You cannot change the binder profile or security from an integrated application.

Procedure

To create a new binder, perform the following steps:

1. After you finish creating a document, choose File - Save As.

2. Open the library where you want to save the document.

3. If you are prompted for a user name and/or password, enter that information and then click OK.

4. Open the file room that contains the file cabinet where you want to create the new binder.

5. Right-click the file cabinet and then choose New Binder.

   The New Binder dialog box displays.

6. Enter the binder title and an optional comment.

7. To specify the binder profile and security settings, click Properties.

   - On the Profile tab, enter the binder title, select a different binder type if necessary, and enter the field values for the binder.

   - On the Security tab, change the permission settings or levels for the binder if necessary.

8. Click OK to save the profile and security settings, and then click OK to finish creating the binder.

To see the new binder, open the file cabinet where you created it. Now you can open the new binder and finish saving the document in it.

Specifying document profile data

When you create a new document in an integrated application and save it in the Domino.Doc library, you'll choose a document type from a predefined list. If the document type has a set of fields (attributes), you can enter field values that make your document easier to organize and locate within the library.

Note   You'll have to enter these values when you initially save your new document.

Procedure

To specify profile data for a new document:

1. In the Domino.Doc Check In dialog box, click Properties.

   The Domino.Doc Modify Properties dialog box displays.

2. Click the Profile tab in the dialog box.

3. Enter a title for your document.

4. Enter a description for your document.

5. Choose a document type.

   The fields that have been defined for this type of document display.

6. Click the first field and enter the information for your document. Repeat as needed for the remaining fields.

7. Click OK when you have completed the field values.

8. When the Domino.Doc Check In dialog box displays, select the options you want and then click OK.

For more information, see "About checking in a document" in Chapter 5, "Working with Documents."

Setting document security
You can set up or change security on a new document, or on an existing document that you checked out.

For more information, see "About document security" in Chapter 5, "Working with Documents."

Setting security on a new document
When you save a new document to a Domino.Doc library, follow the steps below to set the security.

1. In the Domino.Doc Check In dialog box, click Properties.

   The Domino.Doc Modify Properties dialog box displays.

2. Click the Security tab in the dialog box.

3. Specify the permission levels and settings.

4. Click OK.

5. When the Domino.Doc Check In dialog box displays, select the options you want and then click OK.

For more information, see "About checking in a document" in Chapter 5, "Working with Documents."

Editing security on an existing document
To change the security on an existing document without opening it for editing, follow the steps below:

1. In the integrated application, choose File - Open.

2. Open the appropriate library, file room, file cabinet, and binder.

   The dialog box lists the documents in the binder.

3. Right-click the document whose security settings you want to edit, and then choose Check Out from the context menu.

4. With the document still selected, right-click again and choose Properties. The Domino.Doc Modify Properties dialog box displays.

5. Click the Security tab in the dialog box.

6. Specify the permission levels and settings.

7. Click OK.

8. Right-click the document and then choose Check In.

9. When the Domino.Doc Check In dialog box displays, select the options you want and then click OK.

For more information, see "About checking in a document" in Chapter 5, "Working with Documents."

About finding and opening documents

This section describes:

- Finding a previously accessed document
- Searching for a document
- Opening a document
- Viewing a document's revision history
- Editing a document
- Editing a checked-out document
- Editing a document profile
- Working with Domino.Doc properties in Office documents
- Checking in a document

Finding a previously accessed document

Domino.Doc maintains lists of previously accessed documents that you can use to locate a document quickly.

When you choose File - Open in an integrated application, you can click the appropriate icon in the dialog box to see a list of documents that you can choose from. If you are using a Microsoft Office application that is set to use Domino.Doc Office dialog boxes, click the Domino.Doc icon and then click the appropriate icon.

Click this icon:	To do this:
	Access favorite documents in the currently selected library (or in the default library, if no library is selected).
	Access files that are checked out to you from the currently selected library (or from the default library, if no library is selected).
	Access recently edited files in the currently selected library (or in the default library, if no library is selected).

Searching for a document to open

When working in your integrated application, Domino.Doc allows you to perform a search on a single word or multiple words to help you locate the documents you have access to. You can search either the entire library or a single file cabinet.

When you click the Search icon, the dialog box displays the string you most recently used for a search. Other recently used search strings are listed in a dropdown so you can click one to repeat a recent search.

For information on setting the number of previously used search strings displayed in the dialog box, see the *Domino.Doc Administrator's Guide*.

Procedure

To search within your integrated application, perform the following steps:

1. Choose File - Open.
2. Open the library or file cabinet you want to search.
3. If you are prompted for your user name and/or password, enter that information and then click OK.
4. Double-click the Search icon (or choose Find from the Tool menu in the toolbar).
5. Type a new search string in the "Search for" box, keep the most recently used string, or select a different recently used search string.
6. Click OK.

The results of the search displays as a list of the found documents. Double-click on a document to open it.

Opening documents from within an integrated application

You can open a Domino.Doc document for viewing or editing from within an integrated application that is enabled in the Desktop Administrator.

If the document has been archived, a request for retrieval will be sent to the server and the document will display when the request is processed.

Procedure

To open documents stored in a Domino.Doc library from within your integrated application, perform the following steps:

1. Choose File - Open.

   Tip You can use Ctrl+O in PowerPoint 2000 (or later) to display the original PowerPoint Open dialog box and bypass the Domino.Doc Open dialog box.

2. Open the library that contains the document you want.

3. If you are prompted for a user name and password, enter the information and then click OK.

4. Open the appropriate file room, file cabinet, and binder.

   Tip To see only documents of a specific file type, select that type from the File Type list (for example, .lwp).

5. Select the document you want to open.

   Note If the document is already checked out, you will not be able to make changes to it.

6. (Optional) To view the document without making changes to it, select "Open as read-only."

7. (Optional) To view a particular document revision, select "Revision History" and then choose the revision you want from the Version/Date drop-down list.

8. Click Open.

Viewing a document's revision history
When you open a document in an integrated application, you can display the document's revision history and choose the version you want.

Procedure
To access a revision document:

1. Choose File - Open in your integrated application.

2. Open the library that contains the document you want.

3. If you are prompted for a user name and password, enter the information and then click OK.

4. Open the appropriate file room, file cabinet, and binder.

5. Select the document whose revision history you want to view and then select the "Revision History" check box.

   Tip You can also right-click on the document and then choose Revision History from the context menu.

   The dialog box expands to display the Version/Date drop-down list and the User and Comment fields.

6. Select the revision document you want from the Version/Date dropdown.

   Tip To see information about the revision document, choose Properties from the Tool menu in the toolbar.

7. To open a read-only copy of the selected revision document, click Open.

You can also view a document's revision history when you attach a Domino.Doc document to an e-mail, and select the revision document you want to attach.

For more information, see "Attaching a Domino.Doc document to an e-mail" in Chapter 10, "Integrating Domino.Doc with E-mail."

Editing documents from an integrated application

A document stored in the Domino.Doc library must be opened as a checked-out document if you want to edit it, and checked back in when you are done. Checking out a document locks it so that other Editors cannot modify the document, and it retrieves a working copy of the document for editing.

Procedure

To edit a document from within your integrated application, perform the following steps:

1. In the integrated application, choose File - Open.

2. Open the library that contains the document you want.

3. If you are prompted for a user name and password, enter the information and then click OK.

4. Open the appropriate file room, file cabinet, and binder.

   A list of the documents contained in the binder displays.

5. Select the document you want to edit.

6. Click Open.

   The selected document opens for editing.

7. Make your changes and save them.

8. Choose File - Close.

   The Domino.Doc Check In dialog box displays.

9. Do one of the following:

   • Choose Yes for the "Check In?" option to check the document in now.

   • Choose No for the "Check In?" option to check the document in later.

   Tip If you want to continue editing during another session, choose "No." Save the document to your file system (for example, if you want to take a local copy home to continue working on it). If you save to the file system, however, you'll have to check it back in through your browser or Notes.

10. Click OK.

Editing a checked-out document later

If you have documents that you checked out for editing, you can access them directly from your integrated application.

Procedure

Edit the checked out document by performing the following steps:

1. In the integrated application, choose File - Open.
2. Open the library that contains the document you want.
3. If you are prompted for a user name and password, enter the information and then click OK.
4. Open the appropriate file room, file cabinet, and binder.

   The dialog box lists the documents in the binder.
5. Select the document you want to edit and then click Open.
6. Make your changes and save them.
7. Check in the document.

Editing a document profile from an integrated application

To edit a document's profile information, you need to check out the document.

Procedure

To edit a document profile, perform the following steps:

1. In the integrated application, choose File - Open.
2. Open the library that contains the document you want.
3. If you are prompted for a user name and password, enter the information and then click OK.
4. Open the appropriate file room, file cabinet, and binder.

   The dialog box lists the documents in the binder.
5. Right-click the document whose profile you want to edit, and then choose Check Out from the context menu.
6. With the document still selected, right-click again and choose Properties.

   The Domino.Doc Modify Properties dialog box displays.
7. Click the Profile tab in the dialog box.
8. Change the document title, description, type, or field attribute values.
9. Click OK.
10. Right-click the document and then choose Check In.

11. When the Domino.Doc Check In dialog box displays, select the options you want and then click OK.

For more information, see "About checking in a document" in Chapter 5, "Working with Documents."

Tip If you are using Microsoft Word, PowerPoint, or Excel, you can also edit a document profile by opening the document and then choosing File - Properties.

Working with Domino.Doc properties in Office documents

Word, PowerPoint, and Excel users can view, edit, and delete Domino.Doc information with other Office document custom properties when they open a document for editing.

1. In the Office application, open the document that you want.

2. From the File menu, choose Properties.

3. When the Domino.Doc Modify Properties dialog box displays, click OK (or if you opened a read-only copy of the document, click Cancel).

4. When the document's Properties dialog box displays, click the Custom tab.

The Properties box displays the following Domino.Doc information for the document:

- DDocLibrary (Library Name)
- DDocRevision (Document revision number)
- DDocID (Document ID)
- DDocCabinet (Cabinet name)
- DDocBinder (Binder name)

For information on using and modifying document properties, see your Office application Help.

5. When you are ready, click OK to close the dialog box.

Updating Domino.Doc properties

The Domino.Doc information displayed in the Properties dialog box is updated each time you open the document. To preserve any changes that you make to this information, you need to turn off the appropriate setting in the Desktop Administrator Office Fields tab. For example, if you edited a Word document, deselect "Add Domino.Doc information to Microsoft Word documents" in the Office Fields tab. If you leave the setting enabled, the Domino.Doc property values will continue to be updated each time you open the document, overwriting any changes that you made.

For information on how to change the Office application setting, see "Specifying document property settings" in Chapter 2, "Getting Started."

Checking in documents through an integrated application

You can check documents in directly from your integrated application by performing the following steps:

1. After you have made your changes and saved them, choose File - Close.

   The Domino.Doc Check in dialog box displays.

2. Make sure "Check In?" is set to Yes and then select the option you want:

   Check the document in as a version:

   - Choose "Version" to maintain the previous draft or version and create a new version that includes your changes.

   - Choose "Version - replace current version" to replace the previous version with your changed version. This option also deletes the drafts on which the prior version was based.

   - Check "Delete drafts" if drafts are associated with the version and you do not need to keep them as document history.

   Note If a review cycle is required for the document, it cannot be checked in as a version or submitted for approval until the review has been completed. If an approval cycle is required for the document, it cannot be checked in as a version until the document has been marked approved.

   Check the document in as a draft:

   - Choose "Draft" to maintain the previous draft and create a new draft that includes your changes.

   - Choose "Draft - replace current draft" to replace the previous draft with your changed document.

   Check the document in as it was:

   - Choose "Discard changes" if you do not want to record your changes.

3. (Optional) In the Comment box, enter a description of your changes.

4. Click OK.

Reviewing documents from an integrated application

To submit a document for review, you must initiate the process using either the Notes client or a Web browser.

In a serial review, all reviewers edit and/or comment on the document in sequence in the order established by the initiator. In a parallel review, each reviewer edits and/or comments on the document at the same time. When the review cycle is complete, the initiator can delete the review copies and all edits and comments associated with them.

Procedure

To review a draft document, perform the following steps:

1. Open the document you need to review.

2. Review the document.

   Note How the review cycle was set up determines whether you can edit the review copy or only submit a review comment.

3. After you finish reviewing the document, save any changes and then close the document.

4. When the Domino.Doc Review dialog box displays, choose Yes or No to indicate whether the review is complete, enter a comment, and then click OK.

   If others need to review the document, the document state remains In Review and the document is routed to the next reviewer.

   If you are the final reviewer, the document state is changed to Review Complete and the document is either returned to the review initiator or checked in as a new draft or version, depending on how the review cycle was set up.

Approving and rejecting documents from an integrated application

The approval process of document life cycle management is where those on the approval list approve or reject the given version. To submit a document for approval, you must initiate the process using either the Notes client or a Web browser.

Procedure

To approve or reject a document in an approval cycle, perform the following steps:

1. Open the document you want to approve and read it, if you'd like.

2. Click Close.

   The Document Approval dialog displays.

3. Do one of the following:

   • Choose Approve.

     If others need to review the document, the document state remains In Pending Approval and the document is routed to the next reviewer.

     If you are the final approver, the document state is changed to Released and the document is either returned to the approval initiator, checked in as a version, or checked in to replace the current version, depending on how the review cycle was set up.

- Choose Reject.

  The approval cycle ends and the document state is changed to Rejected.

- Choose Close - No decision.

Chapter 9
Working with Domino.Doc from Windows Explorer

This chapter describes how the user navigates the Domino.Doc library from the Windows Explorer, using the Domino.Doc Neighborhood to find and manage the contents of the binders and file cabinets.

- About working with the Windows Explorer interface
- Navigating Domino.Doc from Windows Explorer
- Domino.Doc icons in Windows Explorer
- Working with libraries from Windows Explorer
- Working with file cabinets from Windows Explorer
- Working with binders from Windows Explorer
- Working with documents from Windows Explorer
- Working with the Attache Case
- Searching from Windows Explorer
- Viewing a document's revision history in Windows Explorer

About working with the Windows Explorer interface

You can access Domino.Doc to work with binders and documents directly from Windows Explorer. If you have installed the Domino.Doc Desktop Enabler on your PC, you have also installed this interface. It appears on your desktop as a shortcut called Domino.Doc Neighborhood, and as a Domino.Doc Neighborhood icon in the left pane of Windows Explorer.

For more information about installation and connection, see "Setting up for using the Windows Explorer interface" in Chapter 2, "Getting Started."

This chapter describes how you can use the Domino.Doc Neighborhood to:

- Navigate through file rooms, file cabinets, binder categories and sub categories, and binders
- Work with libraries
- Work with file cabinets
- Work with binders

- Work with documents
- Perform searches of binders and documents
- Access different document revisions

Navigating Domino.Doc from Windows Explorer

The Domino.Doc Neighborhood displays the library and its contents in the familiar file system environment of the Network Neighborhood. Using library, file room, file cabinet, binder category, and binder icons in the left pane, you can explore the hierarchy of your Domino.Doc library, or libraries.
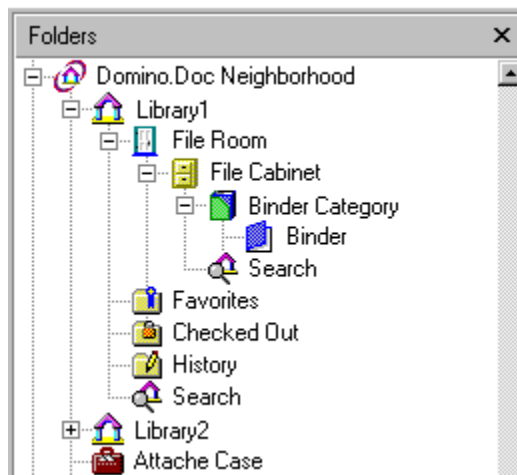
Use the additional icons to locate documents quickly:

- Click Favorites to access your favorite documents.
- Click Checked Out to access documents that are checked out to you.
- Click History to access recently edited documents.
- Click Search to search for documents that contain a particular word or phrase.
- Click Attache Case to work with documents when you are not connected to the network.

The Windows Explorer navigation of Domino.Doc uses the same keyboard and mouse options that you are familiar with as a user of Windows Explorer, summarized below.

Using the mouse

You can use drag-and-drop, left-clicking, double-clicking, and right-clicking to select objects and access pull-down menus.

- You can import documents to Domino.Doc by drag-and-drop, dragging a file from a file system directory to a Domino.Doc binder.

- To expand or collapse a selected object in the left pane, double-click it, or click the plus sign (+) or minus sign (–) next to the object.

- Clicking an item in the left pane displays its contents in the right pane. For example, when you click a file room in the left pane, you see the file cabinets it contains in the right pane.

- Double-clicking on a library, file room, file cabinet, category, or binder opens it for exploration.

- Double-clicking on a document opens it for viewing, or — if checked out — for editing.

- Right-clicking on an item accesses its context menu.

Using the keyboard

You can navigate the Domino.Doc Neighborhood and perform menu commands using the keyboard.

- To move between the left pane and the right pane, press TAB.

- To move to the next level up, press the Up arrow.

- To move to the next level down, press the Down arrow.

- To expand or collapse a selected object in the left pane, press the Right arrow key or the Left arrow key, or plus sign (+) or minus sign (–).

- To refresh the display, press F5.

- To open a selected item, press ENTER.

- To access the Explorer menu, press ALT, and then press the underlined letter of the pull-down menu you want to display. To choose a command from the pull-down menu, press the underlined letter of the command you want to perform.

- To access the context menu for a selected item, press either SHIFT+F10 or the Application key (located next to the CTRL key). Then press the underlined letter of the menu command you want to perform.

Toolbar buttons
Use the toolbar buttons to manage the view format.

You can select large or small icons, arrange contents as lists, or display details such as revision number, state, document type, and author.

Note The toolbar that you see may look different depending on the operating system you are using.

Viewing contents
Choose View - Arrange Icons to organize the items displayed in the right pane of the Explorer window; the commands listed on the submenu vary depending on your context. For example, when you view the contents of a binder, you can arrange the documents by title, type, author, and so on. When you view the contents of the Attache Case, you can arrange the items by title, version, and mode.

For all objects other than documents, the Details view shows only the Title.

For documents in Favorites, History, and Checked Out, only the Title is displayed. To see information about a document, display the document's properties window by right-clicking and selecting Properties from the context menu.

For documents in binders, or documents in Search results, when you are in the Details view, you see six columns: Title, Version, State, Type, Author, Modified. Clicking any column title sorts the documents in ascending or descending order. You can also resize each column by dragging the column boundary to the left or right.

Selecting Refresh from the context menu is the same as using the View - Refresh menu item from the Explorer's menu bar, or F5. It refreshes everything shown by Windows Explorer.

Selecting Properties from the context menu when you right-click an item will present the security and profile description of the selected binder or document. This information is available only for viewing if the item is a binder. You can modify this information for a binder only when creating the binder.

Multiple windows
If you are using the context menu Open command, more than one window will be displayed. You can switch between windows to navigate from one object to another.

Domino.Doc icons in Windows Explorer

When working with Domino.Doc in Windows Explorer, understanding what these icons represent will help you to navigate quickly:

Domino.Doc Neighborhood

Domino.Doc Library

File Room

File Cabinet

Binder Category, or sub category

Binder

Favorites

History

Checked Out

Attache Case

Search

Working with libraries from Windows Explorer

You can have multiple library connections and switch from one to another by clicking the connection you want.

For more information about connecting libraries, see "Setting up for using the Windows Explorer interface" in Chapter 2, "Getting Started."

You can click on the plus signs in the navigation pane to expand the library hierarchy to see the file rooms, file cabinets, binder categories, and binders. You can right-click on any of the icons to obtain a context menu to perform associated actions on the item.

When you right-click on a library icon in the navigation pane of the Windows Explorer, you can use the commands listed below.

The Favorites, Checked Out, and History buttons in the ODMA dialog box use the default library if you don't already have a library open. For example, if you have several library connections and choose File - Open, you can click Favorites in the location bar to automatically open the default library and navigate to the Favorites folder.

Choose this command:	*To do this:*
Explore	Display all rooms for the selected library in the view pane.
Open	Display all rooms for the selected library in a separate window.
Disconnect Library	End the library connection.
Set as Default Library	Make the selected library the default. **Note** The default library is used by the Favorites, Checked Out, and History buttons in the ODMA dialog box when you use an integrated application to work with Domino.Doc.
Refresh	Refresh the display.
Properties	Update the URL for a Domino.Doc library or edit the displayed library name.

Note You cannot create or delete a library, file room, or file cabinet using Windows Explorer.

When you have selected open or explore, you can find a particular binder or document by inspecting file cabinets and binders, or by using one of the collections — Favorites, History, Checked Out, or Search results. The icons for these items all appear in the view pane or the new window, depending on whether you selected Explore or Open. You can right-click on the icons to open context windows with corresponding options.

Working with file cabinets from Windows Explorer

When you right-click on a file room icon in the navigation pane, you can open or explore the file room to see the file cabinets it contains. From the File Cabinet view you can view the binders to explore their contents, or create new ones.

When you right-click on a file cabinet in the navigation pane, or in the room's Open or Explore window, you can use the commands listed below.

Choose this command:	To do this:
Explore	Display all binder categories for the selected file cabinet in the right pane of the Explorer.
Open	Display all binder categories for the selected cabinet in a separate window.
Refresh	Refresh the display.
New Binder	Create a new binder (categorized or non-categorized).

Note You cannot create, delete, or move a file cabinet in Windows Explorer. These are administrative functions that must be performed from the Notes Client by a Domino.Doc Administrator.

Working with binders from Windows Explorer

When you right-click on a binder in the navigation pane of the Windows Explorer, or on a binder icon in the view pane, you can use the commands listed below.

Choose this command:	To do this:
Explore	Display all documents for the selected binder in the right pane of the Explorer.
Open	Display all documents for the selected binder in a separate window.
Refresh	Refresh the display.

continued

Choose this command:	To do this:
New Document	Add a new Domino.Doc document to the library using an existing file from a file system directory.
Delete	Delete the selected binder. If there are no other binders in the current category (or sub category), the category (or sub category) will be deleted as well.
Properties	View information about the binder's profile and security settings.

Note   You cannot move or copy binders to other file cabinets in Windows Explorer.

For more information about the use of binders in Domino.Doc see Chapter 4, "Working with Binders."

Creating a binder

To create a binder, select the file cabinet where you want to place it, and right-click to select New Binder from the context menu. When you create a binder, you can choose whether to display the binder in one or more categories or sub categories. You can also customize the binder's properties — security and profile information.

To create a new binder, perform the following steps:

1. Select the file cabinet where you want to put the binder, right-click the selected cabinet, and choose New Binder.

2. Enter the binder title.

3. (Optional) Enter comments.

4. (Optional) Click Properties to edit the binder's properties and/or security, and to select a binder type or to categorize the binder.

   Note   You cannot edit these properties In Windows Explorer after the binder has been created.

5. To categorize the binder, select Categorized from the Type pull-down list and enter a name for the category in the space provided then. If you do not specify a category name, the new binder will appear under Non-Categorized.

   To create sub categories, or to use multiple categories:

   - To create the binder in a sub category, enter a '\' between the category and sub category names (for example, use Training\Management to create a Training category with a Management sub category).

- To display the binder in multiple categories and/or sub categories, enter a semicolon (;) between each category or sub category.

Note Categories and sub categories are created only when you create a new binder. When there is no longer a binder in the category, the category is removed, along with any empty sub categories.

6. Click OK to close the Properties box.

7. Click OK to create the binder.

Adding a document to a binder

To add a document that exists in your file system to a binder, you can use either of two methods:

- Use Windows Explorer to find it, and drag it to the binder icon of the binder you want to put it in.

- Use the New Document option from the context menu.

To use the New Document option:

1. Right-click on the binder, choose New Document, and select the document either by browsing the Add Document box, or by entering its path name.

   Note The file name should not include any of the following characters: \ / : * ? " < > |

2. Click Open.

   The Check In dialog box displays.

3. Enter a Title for the document in the title field.

4. (Optional) Select Properties to set or change property and/or security settings.

5. (Optional) Add comments. Information entered here is visible only from the Notes client interface.

6. Select a Check-in option.

7. Click OK.

Working with documents from Windows Explorer

This section describes how to use the Domino.Doc Neighborhood to work with documents:

- Adding a document to a binder

- Options for working with documents in a binder

- Editing a document
- Finding a previously accessed document

The next section explains how to use the Attache Case.

For more information about the use of documents in Domino.Doc, see Chapter 5, "Working with Documents."

Adding a document to a binder

To add a document that exists in your file system to a binder, you can use either of two methods:

- Use Windows Explorer to find it, and drag it to the binder icon of the binder you want to put it in.
- Use the New Document option from the context menu.

To use the New Document option:

1. Right-click on the binder, choose New Document, and select the document either by browsing the Add Document box, or by entering its path name.

   Note The file name should not include any of the following characters: \ / : * ? " < > |

2. Click Open.

   The Check In dialog box displays.

3. Enter a Title for the document in the title field.

4. (Optional) Select Properties to set or change property and/or security settings.

5. (Optional) Add comments.

6. Select a Check-in option.

7. Click OK.

Options for working with documents in a binder

When you right-click on a document in the left pane of the Windows Explorer, the commands that appear on the pop-up menu change depending on the document's current state. The list may include any of the commands described below.

Choose this command:	To do this:
Edit	Open the document for editing if you have it checked out. If it is not checked out, it will be checked out transparently and opened for editing. You must have Editor access rights to the document.
View	Open the selected document for viewing. Documents created in the Notes client or the browser client display in Windows Explorer if they have an attachment. (This option is not available if the document is checked out.)
Print	Print the selected document.
Check Out	Open the document and lock out other users from accessing it, other than for viewing. Creates a working copy. You must have Editor access rights to the document.
Check In	Return the document to the library, optionally replaced or versioned. Unlocks the document so other users can access it. (This option is not available unless the document is checked out.)
Complete Review	Finish editing or commenting on the selected file, depending on how the review cycle was set up. If others need to review the document, it is routed to the next reviewer. If you are the final reviewer, the document is either returned to the review initiator or checked in as a new draft or version, depending on how the review cycle was set up.
Approve	Approve the selected document. If others need to approve the document, it remains in the Approval state and is routed to the next approver. If you are the final approver, the document is either returned to the approval initiator, checked in as a new version, or checked in to replace the current version, depending on how the approval cycle was set up.
Reject	Reject the selected document and end the approval cycle.
Add to Favorites	Add the selected document to your favorites list for easy access.
Remove from Favorites	Remove the selected document from the favorites list. (This option is available only when you select the document from within the favorites list.)
Copy Bookmark to Binder	Create a bookmark to the selected document in a binder to which you have Editor access. **Note** To remove a bookmark, right-click it and then choose Delete.
Move to Binder	Select a different binder for this document. **Note** This function can be performed only in the master file cabinet replica.

continued

Choose this command:	To do this:
Add to Attache Case	Make document available for offline use. Described in Working with the Attache case section.
Delete	Delete the document from the binder. You must have Editor access rights to the document.
Revision History	Display the document's revision history and view a previous revision.
Properties	Display the security and profile information. You can change the properties only if the document is checked out to you.
Version x.x	View, print, or display the properties for the version (rather than for the most recent draft). **Note** This command is available if the selected document's revision history includes a draft (to which you have access) that was created after a version.

Editing a document

To edit a document, you must have Editor access rights to it, and you must have it checked out. If you have already checked it out, double-click on it to open it for editing. If it is not checked out, right-click on it and select Edit from the context menu to check it out and put it into Edit Mode.

When you have finished the editing, you must check it back in, right-clicking to select Check In from the context menu. For more information, see "About checking in a document" in Chapter 5, "Working with Documents."

Document properties

You can change document profile information and/or security only during document creation, or when the document is checked out. You must have Editor access rights to the document.

For more information, see "About document types" and "About document security" in Chapter 5, "Working with Documents."

Favorites

The Favorites folder allows you to find a document and perform an action on it without having to locate the document in its original file cabinet and binder.

Documents displayed in a Favorites folder are also displayed in the original binder. You can add a document to the Favorites folder from the Notes, browser, or Explorer interface, or from an integrated application. If a document is deleted from the original binder, it might not also be deleted from the favorites folder.

You can view the Favorites contents in the right pane in Windows Explorer by choosing Explore from the context menu, or in a separate window by choosing Open from the context menu, or by clicking on it in the navigation pane.

For more information, see "About favorite documents" in Chapter 5, "Working with Documents."

Recently edited documents

The History folder allows you quick access to five of your most recently edited documents. If you are a Domino.Doc Administrator, you can see all users' recently edited documents by using the Notes client. You can perform any document action on the copy in the History folder (this is a link to the original document) without locating the document in its original binder.

You can view the History folder contents in the right pane in Windows Explorer by choosing Explore from the context menu, or in a separate window by choosing Open from the context menu.

For more information, see "About recently edited documents" in Chapter 5, "Working with Documents."

Checked out documents

The Checked Out folder lists all documents currently checked out to you. If you are a Domino.Doc Administrator, you can see a list of all checked out documents by using the Notes client.

You can view the Checked Out folder's contents in the right pane in Windows Explorer by choosing Explore from the context menu, or view it in a separate window by choosing Open from the context menu.

For more information, see "About checking out a document" in Chapter 5, "Working with Documents."

Search

For information, see "Searching from Windows Explorer" later in this chapter.

Working with the Attache Case

The Attache Case facilitates working with documents offline. You use it to pull documents from the library and work with them while disconnected from the library. When you place documents in the Attache Case you are creating a local copy to view or edit so that you can work on them while disconnected from the network. When you reconnect, you can easily return the documents to the library. The Attache Case works best with a manageable number of documents and is not meant to be a mass export/import tool.

Things you should know about the Attache Case:

1. Any document, except archived documents, whether a draft or a version, can be placed in the Attache Case.

2. Documents that are already checked out by you can be placed in the Attache Case in Edit mode.

3. Documents that are not checked out to any user, but can be checked out by you, can be placed in the Attache Case in Edit mode.

4. Any review document can be placed in the Attache Case, but can be in Edit mode only if you have edit permission on it. If you have only comment permission, it will be in View mode.

5. Any documents that have been checked out by someone else can be placed in the Attache Case as View mode only.

6. When documents, other than review documents, are placed in the Attache Case, they are automatically checked out to you if added in Edit mode.

7. Documents in the Attache Case may be returned to the library individually or all at once.

Adding a document to the Attache Case

All documents, except archived documents, have an Add to Attache Case menu item on their context menus. To add a document to the Attache Case, select the document and choose Add to Attache Case from the context menu. If the file is checked out by you, or could be checked out by you, you will be prompted whether to add the file to the Attache Case in Edit mode or View mode. Select Edit if you want to check out the document. If the document cannot be checked out to you, you will be informed that the document can be added to the Attache Case only in view mode, and given the choice of proceeding with View mode or canceling the operation.

Viewing the Attache Case contents

To view the contents of the Attache Case, right-click the Attache Case icon and select Explore or Open from the context menu. The view pane will display the set of documents currently in the Attache Case. For each document, three columns are listed if in Details view: Title, Version and Mode. The Title and Version columns display the Title and Version of the document as it was when it was added to the Attache Case. The Mode column displays the mode selected when the document was added to the Attache Case, either Edit or View.

Working with Documents in the Attache Case

For documents in the Attache Case in Edit mode, the context menu offers the actions shown below for a selected document.

Choose this command:	To do this:
Edit	Open the document for editing if you have it checked out. If it is not checked out, it will be checked out transparently and opened for editing. You must have Editor access rights to the document.
View	Open the document for viewing if it was added to the Attache Case in View mode.
Print	Print the selected document. You can print documents, drafts, or versions.
Check In	Return the document to the library, optionally replaced or versioned. Unlocks the document so other users can access it. If there is a mismatch in versioning, you will be warned and will have the option to cancel the check-in operation. If the check-in is successful, you will be given the option to remove it from the Attache Case. (This option is not available if the document is in the Attache Case in View mode.)
Retrieve Latest Version	Put the latest version into the Attache Case. If the document is in Edit mode, but no longer checked out to you, you will be asked whether to retrieve it in Edit or View mode. If it cannot be checked out to you, you will be offered View mode only.
Remove	Remove the document from the Attache Case. You must confirm the action.

Working with all documents in the Attache Case

The Attache Case has items on its context menu to allow working with all the documents in the Attache Case at once. Right-click on the Attache Case icon to get this menu.

Choose this command:	*To do this:*
Explore	Display all documents in the Attache Case in the right pane of the Explorer.
Open	Display all documents in the Attache Case in a separate window.
Check In All	Return all the documents to the library, optionally replaced or versioned. Unlocks the documents so other users can access them. If there is a mismatch in versioning on any document, you will be warned and will have the option to cancel the check-in operation for it. If the check-in is successful for any document, you will be given the option to remove all checked in documents from the Attache Case.
Refresh	Refresh the display.
Retrieve Latest Versions	Put all the latest versions into the Attache Case. If a document is in Edit mode, but no longer checked out to you, you will be asked whether to retrieve it in Edit or View mode. If it cannot be checked out to you, you will be offered View mode only.
Remove All	Remove all the documents from the Attache Case. You must confirm the action.

Searching from Windows Explorer

Anywhere you navigate in Domino.Doc using the Windows Explorer, a Search icon is available for you to access Search.

For example, when you navigate to a library, you see a Search icon there for searching the library; when you navigate to a file cabinet, you see a Search icon there for searching the cabinet.

Also, for your convenience, when you open the search box, the default entry in the "Search for" box will be the string you most recently used for a search. Other recently used search strings appear in a drop-down list so you can click one to repeat a recent search. For information about setting the number of search strings displayed in the dropdown list, see the *Domino.Doc Administrator's Guide*.

Procedure

To search for documents from the Windows Explorer, perform the following steps:

1. Navigate to the library or cabinet you want to search.
2. Double-click the Search icon.
3. Type a search string in the Search for box, use the most recently used string, or click a string from the drop-down list of other recently used search strings.
4. Click OK.

Viewing a document's revision history in Windows Explorer

You can display a document's revision history and then choose the revision you want.

Procedure

To access a revision document:

1. Right-click the document whose revision history you want to view.
2. From the context menu, choose Revision History.

    A dialog box lists the various document revisions associated with the selected document.
3. (Optional) To display information about a particular revision, select the revision and then click Properties.
4. (Optional) To open a read-only copy of a particular revision, select the revision and then click View.

Chapter 10
Integrating Domino.Doc with E-mail

If you use Lotus Notes or Microsoft Outlook e-mail, you can incorporate information from a Domino.Doc library into e-mail and preserve information from e-mail in Domino.Doc.

- About using Domino.Doc with e-mail
- Attaching a Domino.Doc document to an e-mail
- Importing a Domino.Doc document into an e-mail
- Saving an e-mail attachment to Domino.Doc
- Exporting an e-mail to Domino.Doc

About using Domino.Doc with e-mail

You can access Domino.Doc libraries using either Notes or Outlook e-mail.

When you use Notes e-mail with Domino.Doc, you use standard Notes commands and dialog boxes that are probably already familiar to you. When you use Outlook, Domino.Doc adds new menu commands and dialog boxes that look similar to the Outlook interface.

Domino.Doc supports Outlook 2000 or later when used with the native Outlook e-mail editor. If you are using Outlook XP, you must reconfigure the application to use the native editor instead of Word. Outlook Express is not supported.

Attaching a Domino.Doc document to an e-mail

When you edit a Notes document (e-mail or another type that contains a rich text field) or an Outlook e-mail, you can access a Domino.Doc library and attach one or more documents to the current document.

The attachment serves as a snapshot of the Domino.Doc document and does not reflect subsequent changes to the document, nor does the Domino.Doc document reflect changes made to the attachment.

Procedure

To attach a Domino.Doc document to a Notes document or an Outlook e-mail:

1. In the field where you want to attach the Domino.Doc document, do one of the following:

    - (Notes) Choose File - Attach to display the Create Attachment(s) dialog box.

    - (Outlook) In the native Outlook e-mail editor, choose Insert - Domino.Doc Item to display the Domino.Doc Open dialog box.

2. Open the appropriate library, file room, file cabinet, and binder.

3. Select the document you want to attach.

4. (Optional) To check out the selected document, do one of the following:

    - (Notes) Select "Check Out."

    - (Outlook) "Deselect "Open as read-only."

5. (Optional) To attach a particular revision document, select the "Revision History" check box and then select the revision document you want from the Version/Date dropdown.

    Tip   You can also right-click on the document and then choose Revision History from the context menu.

6. Do one of the following:

    - (Notes) In the Create Attachment(s) dialog box, click Create.

    - (Outlook) In the Domino.Doc Open dialog box, click Open.

For information on using the Notes client or Web browser to forward a document, see Chapter 6, "Working with Domino.Doc from the Notes Client," or Chapter 7, "Working with Domino.Doc from a Browser."

Importing a Domino.Doc document into an e-mail

When you edit a Notes document (e-mail or another type that contains a rich text field) or an Outlook e-mail, you can access a Domino.Doc library and import the content of a Domino.Doc document's file attachment into the current document.

For example, you can import the content of a document's Word Pro file attachment into an e-mail. You cannot import data from a document that has Notes content (that is, text typed directly into the document) instead of a file attachment.

The imported content serves as a snapshot of the Domino.Doc document and does not reflect subsequent changes to the Domino.Doc document, nor does the Domino.Doc document reflect changes made to the imported content in Notes or Outlook.

Procedure

To import content from a Domino.Doc document into a Notes document or an Outlook e-mail:

1. In the field where you want to import the document content, do one of the following:

    - (Notes) Choose File - Import to display the Import dialog box.
    - (Outlook) In the native Outlook e-mail editor, choose Insert - Domino.Doc Item to display the Domino.Doc Open dialog box.

2. Open the appropriate library, file room, file cabinet, and binder.

    The dialog box lists the documents that have an associated file attachment.

3. Select the document whose content you want to import.

4. (Optional) To import the content of a particular revision document, select the "Revision History" check box and then select the revision document you want from the Version/Date dropdown.

    Tip You can also right-click on the document and then choose Revision History from the context menu.

5. Do one of the following:

    - (Notes) In the Import dialog box, click Import.
    - (Outlook) In the Domino.Doc Open dialog box, select "Insert as Text" and then click Open.

For information on using the Notes client or Web browser to forward a document, see Chapter 6, "Working with Domino.Doc from the Notes Client," or Chapter 7, "Working with Domino.Doc from a Browser."

Saving an e-mail attachment to Domino.Doc

You can detach a file from a Notes e-mail or other document, or from an Outlook e-mail and either save the file as a new Domino.Doc document or use it to update an existing document's file attachment.

For example, you can save a Word file attachment as a new document, or use it to update the current Word file attachment associated with a Domino.Doc document.

Note You cannot save an attachment to an existing document that has Notes content instead of a file attachment.

Saving as a new document

To save a file attachment as a new Domino.Doc document:

1. Do one of the following:

   - (Notes) Open the document that contains the file attachment you want to save. Then click the attachment and choose Attachment - Detach to display the Save Attachment dialog box.

     If the document contains more than one attachment, you need to save each attachment individually. You cannot use the Detach All command or save more than one attachment at a time.

   - (Outlook) Select the document that contains the file attachment you want to save (or open the document in the native e-mail editor). Then choose File - Save Attachments to Domino.Doc to display the Save Attachment to Domino.Doc dialog box.

     If the document contains more than one attachment, the Save All Attachments to Domino.Doc dialog box displays. Select the attachments you want and then click OK. (To close the dialog box without selecting any attachments, click Close.)

2. Open the library, file room, file cabinet, and binder where you want to save the attachment.

3. Do one of the following:

   - (Notes) In the Save Attachment dialog box, click Detach.

   - (Outlook) In the Save Attachment to Domino.Doc dialog box, click Save.

4. In the Check In dialog box, do the following:

   - Enter a title and optional comment.

   - Select a Check In option.

   - Click Properties and then specify the profile and security settings.

   - Click OK.

   If you are saving multiple attachments from an e-mail in Outlook, you see a separate Save Attachment to Domino.Doc dialog box and a separate Check In dialog box for each attachment. If needed, you can specify a different location and check-in options for each file. Repeat steps 2 through 4 to finish saving each attachment.

Saving as an update to an existing document

To update the file attachment associated with an existing Domino.Doc document:

1. Check out the document that you want to update.

2. Do one of the following:

   - (Notes) Open the document that contains the file attachment you want to use to update the checked out document. Then click the attachment and choose Attachment - Detach to display the Save Attachment dialog box.

   - (Outlook) Select the document that contains the file attachment you want to use (or open the document in the native e-mail editor). Then choose File - Save Attachments to Domino.Doc to display the Save Attachment to Domino.Doc dialog box.

     If the document contains more than one attachment, the Save All Attachments to Domino.Doc dialog box displays. Select the attachment you want and then click OK. (To close the dialog box without selecting any attachments, click Close.)

3. Open the appropriate library, file room, file cabinet, and binder.

4. Select the document that you checked out in step 1.

5. Do one of the following:

   - (Notes) In the Save Attachment dialog box, click Detach.

   - (Outlook) In the Save Attachment to Domino.Doc dialog box, click Save.

6. In the Check In dialog box, do the following:

   - Select a Check In option.

   - If needed, click Properties and then change the profile and security settings.

   - If needed, enter a comment.

   - Click OK.

   If you selected multiple attachments from an e-mail in Outlook, you see a separate Save Attachment to Domino.Doc dialog box and a separate Check In dialog box for each attachment. You can use the attachments to update existing files that you checked out, or save the attachments as new documents.

Exporting an e-mail to Domino.Doc

When you are in Notes or Outlook, you can save the body of a document (excluding any attachments) as either a new Domino.Doc document or an update to an existing document.

Note File attachments in the document are not saved, although a picture of the attachment's icon may appear. Only the document content is saved.

Exporting as a new document
To export the body of a document (excluding any attachments) as a new Domino.Doc document:

1. Do one of the following:

    - (Notes) Open the document whose content you want to save. Then choose File - Export to display the Export dialog box.

    - (Outlook) Select the document whose content you want to save (or open the document in the native e-mail editor). Then choose File - Save to Domino.Doc to display the Domino.Doc Save As dialog box.

2. Open the library, file room, file cabinet, and binder where you want to save the document content.

3. (Notes) Enter the file name including the file extension.

4. Select a format from the "Save as type" drop-down box. The file format should be consistent with the specified file extension.

5. Do one of the following:

    - (Notes) In the Export dialog box, click Export.

    - (Outlook) In the Domino.Doc Save As dialog box, click Save.

6. In the Check In dialog box, do the following:

    - Enter a title and optional comment.

    - Select a Check In option.

    - Click Properties and then specify the profile and security settings.

    - Click OK.

Exporting as an update to an existing document
To update the file attachment associated with an existing Domino.Doc document:

1. Check out the document whose file attachment you want to update.

2. Do one of the following:

    - (Notes) Open the document whose content you want to save. Then choose File - Export to display the Export dialog box.

- (Outlook) Select the document whose content you want to save (or open the document in the native e-mail editor). Then choose File - Save to Domino.Doc to display the Domino.Doc Save As dialog box.

3. Open the appropriate library, file room, file cabinet, and binder.

4. Select the document whose file attachment you want to update.

5. (Optional) Select a file format from the "Save as type" drop-down box.

6. Do one of the following:
   - (Notes) In the Export dialog box, click Export.
   - (Oulook) In the Domino.Doc Save As dialog box, click Save.

7. In the Check In dialog box, do the following:
   - Select a Check In option.
   - If needed, click Properties and then change the profile and security settings.
   - If needed, enter a comment.
   - Click OK.

Chapter 11
Working with Lotus Workflow

This chapter provides an overview of how Domino.Doc and Lotus Workflow interact, and provides instructions for initiating workflow processes and viewing process status from Domino.Doc. It contains the following sections:

- About Lotus Workflow
- About initiating workflow processes from Domino.Doc
  - Initiating interactive workflow processes from Domino.Doc
  - Viewing associated workflows from a browser
  - Viewing associated workflows from Notes

About Lotus Workflow

Lotus Workflow is a Workflow Development and Management System for designing electronically driven processes like customer orders, design reviews, and expense reports. Lotus Workflow automates daily business processes and assists in coordinating tasks between workgroups. Business processes are modeled on the basis of the existing document flows, and are enhanced by the ability to flexibly modify them.

Lotus Workflow extends the document management capabilities of Domino.Doc by providing structured and ad hoc workflow processes.

Lotus Workflow manages the workflow processes and Domino.Doc stores and manages the documents associated with the workflows.

From within Domino.Doc, you can initiate workflow processes, see what workflow processes (or jobs) are associated with particular documents, and view process activity in Lotus Workflow.

About initiating workflow processes from Domino.Doc

- **Event-based**, or structured, workflow processes can be automatically initiated from Domino.Doc based on events. A workflow process is associated with a particular Domino.Doc event on the Document Type definition form. When the event occurs (for example, a document is checked in, or a document approval cycle is completed), the associated workflow process will initiate automatically.

  For example, if an Administrator created a document type "Expense Report" to initiate "Expense Report Handling" based on "First document check in," then when you check an expense report spreadsheet into Domino.Doc, the document would automatically be routed through the appropriate Lotus Workflow review and approval path.

  You can view the workflow activity by opening the document and accessing the workflow tab.

- **Interactive** workflow processes can be initiated manually from Domino.Doc. These processes can be selected from a list of available processes defined on the Document Type form. For example, a document type of Client Correspondence could have associated processes of Purchase Order and Material Order.

For more information, see "Initiating interactive workflow processes from Domino.Doc" in this chapter.

Initiating interactive workflow processes from Domino.Doc

New workflows can be initiated interactively based on document type options.

To initiate an interactive workflow process, perform the following steps.

1. Open the file cabinet and binder that contains the document, then open the document.
2. Click on the Workflow tab.
3. Click on the statement: "Click here to choose from a list of available processes."

   The New Job dialog box displays.
4. Select the process you want to initiate.
5. Accept or change the Job name.

6. Specify the process priority:
   - 1. High
   - 2. Medium
   - 3. Low
7. Do one of the following:
   - Click Initiate if you are working in a browser.
   - Click OK if you are working in Notes.

   The main document of the workflow displays.
8. Complete the form information.
9. (Optional) Click Switch to Cover to verify or change the document cover information.
10. Do one of the following:
    - Select Save and complete activity, then click Submit if you are working in a browser.
    - Click Save and Complete if you are working in Notes.

    The activity is performed.

Viewing associated workflows from a browser

Domino.Doc Documents that have associated workflow processes have a Workflow tab that provides access for viewing workflow activity.

Procedure
To view a document's workflow activity from a browser, perform the following steps.

1. Open the file cabinet and binder that contains the document, then open the document profile.
2. Choose Document - Workflow.
3. Beneath the section "Here is a list of all associated workflows," select the appropriate job.
4. Do one of the following:
   - Click View to display a list of all documents associated with the selected job.
   - Click Cover to open the cover document associated with the activity to view general information, such as who is responsible for completing the activity, due dates, and so forth.
   - Click Reference to display the workflow document that contains the reference to the currently opened Domino.Doc document.

Viewing associated workflows from Notes

Domino.Doc Documents that have associated workflow processes have a Workflow tab that provides access for viewing workflow activity.

Procedure

To view a document's workflow activity from Notes, perform the following steps.

1. Open the file cabinet and binder that contains the document, then open the document.

2. Click on the Workflow tab.

3. Click on the statement "Click here for a list of associated jobs and activities."

   The Show Workflow Information dialog box displays.

4. Select an activity.

5. Select one of the following:

   - Open Cover document to open the cover document associated with the activity to view general information, such as who is responsible for completing the activity, due dates, etc.

   - Open Reference to display the workflow document that contains the reference to the currently opened Domino.Doc document.

   - Open View to display a list of all documents associated with the selected job.

6. Click OK.

7. Do one of the following:

   - View the information, then click Close.

   - Click Claim & Edit, make necessary changes, then click Save & Complete.

Chapter 12
Troubleshooting

This chapter identifies some common problems you could encounter and gives solutions or workarounds in these sections:

- About the Domino.Doc log
- Why can't I...?
- General issues
- Known ODMA application issues

About the Domino.Doc log

As you work with Domino.Doc in the Desktop Enabler, a log reports processing errors that can help you troubleshoot problems. The log, domdoc.log, is a text file that gets created in your Domino.Doc directory. It provides the activity date and time, a numeric Error Code, a message or description of the error, and the affected module.

If you encounter processing problems with Domino.Doc, review this log prior to calling Customer Support, and be prepared to give this information to the support representative. If you are having ongoing problems, you can set the "Verbose logging" option to provide additional information to help you solve these problems.

By default the "Truncate log file" option is set to create a new log for each Domino.Doc session. Turn this option off to identify recurring problems.

For more information, see "Changing the log file settings" in Chapter 2, "Getting Started."

Why can't I...?

- Access my Domino.Doc library through my Web browser?

  For details, see "I can't access Domino.Doc from my browser" later in this chapter.

- Access the Domino.Doc library using HTTP protocol?

  For details, see "I can't access the Domino.Doc library using HTTP protocol" later in this chapter.

- Access the Domino.Doc library using Notes protocol?

  For details, see "I can't access the Domino.Doc library using Notes protocol" later in this chapter.

- Continue working in my browser after clicking Cancel on a security information dialog box?

  For details, see "I can't continue working in my browser after clicking Cancel on a security information dialog box" later in this chapter.

- Continue working after trying to access Domino.Doc via the Notes protocol?

  For details, see "I can't continue working after trying to access Domino.Doc via the Notes protocol" later in this chapter.

- Eliminate JavaScript errors when using Internet Explorer?

  For details, see "I can't eliminate JavaScript errors when using Internet Explorer" later in this chapter.

- Eliminate JavaScript errors when using Netscape Communicator?

  For details, see "I can't eliminate JavaScript errors when using Netscape Communicator" later in this chapter.

- See any file cabinets, binders, and documents?

  For details, see "I can't see any file cabinets, binders, and documents" later in this chapter.

- Send a mail message when I invite a user to a file cabinet?

  For details, see "I can't send a mail message when I invite a user to a file cabinet" later in this chapter.

  - Open an edited binder profile?

  For details, see "I get an error message when I open an edited binder profile" later in this chapter.

  - Download any files from Internet Explorer?

  For details, see "I can't download any files from Internet Explorer" later in this chapter.

I can't access Domino.Doc from my browser

In order to access Domino.Doc from your browser, your browser must support JavaScript. If you cannot access Domino.Doc from your browser, this option may have been turned off. To check the setting, follow the appropriate procedure below.

If you are using Netscape 4.x:

1. Select Edit - Preferences.

2. Look at the Advanced category and ensure that "Enable JavaScript" is selected.

If you are using Internet Explorer 5.x:

Please refer to the Internet Explorer Help topic on Security settings.

Note   If you used an earlier version of Domino.Doc from your browser, you will need to replace any Bookmarks (Netscape) or Favorites (Internet Explorer) to your libraries. Create a new bookmark or favorite when you enter the library, then use it and refresh the page.

I can't access the Domino.Doc library using HTTP protocol

These issues apply to users of the Domino.Doc Desktop Enabler (Windows Explorer interface and integrated applications).

- Domino.Doc looks for certain Internet-related files. If these did not copy properly during the installation of Internet Explorer, you won't be able to access Domino.Doc using the HTTP protocol. You may get the following error message from Domino.Doc: "One or more components are missing, or there are incorrect registry entries. Consult the Domino.Doc Release Notes for more information."

  Reinstall the Domino.Doc Desktop Enabler. If the problem persists, you should reinstall Internet Explorer if you are using that as your browser.

  The same problem could occur if an attempt to uninstall the Internet Explorer was not entirely successful. If you ran uninstall because you are using a different browser, locate the file SHDOCVW.DLL (it's probably in your Windows system directory) and rename it. Then, reinstall the Domino.Doc Desktop Enabler.

- The Domino.Doc 3.5 Desktop Enabler works with the Domino.Doc 3.1 (or later) server. If you get the following message when you try to connect to your library, notify your System Administrator: "HTTP error communicating with server."

I can't access the Domino.Doc library using Notes protocol

These issues apply to users of the Domino.Doc Desktop Enabler (Windows Explorer interface and integrated applications).

The Domino.Doc 3.5 Desktop Enabler does not work with some prior versions of the Notes client. Please refer to the Domino.Doc 3.5 Release Notes for a listing of the supported Notes client versions.

The Domino.Doc 3.5 Desktop Enabler works with the Domino.Doc 3.1 (or later) server. If you get the following message, notify your System Administrator: "Domino.Doc Server was not able to perform the request. Verify that you have appropriate access to perform this operation."

I can't continue working in my browser after clicking Cancel on a security information dialog box

When creating a new file cabinet, binder, or document in Domino.Doc using a browser, you may get a Security Information message after saving the file cabinet, or choosing the binder or document type. Click Continue to close the message and finish creating your document.

Note   If you choose Cancel instead of Continue, it will appear that processing is occurring, when nothing is actually happening, and you will not be able to perform any additional actions.

To prevent this message from displaying, follow the appropriate procedure below.

If you are using Netscape 4.x:
1. From your Netscape menu bar, choose Communicator - Tools - Security Info.

   The Security Information Page displays.

2. Choose Navigator and in the Show a warning before section, deselect "Sending unencrypted information to a site."

3. Click OK.

If you are using Internet Explorer 5.x:
Please refer to the Internet Explorer Help topic on Security settings.

I can't continue working after trying to access Domino.Doc via the Notes protocol

When trying to access Domino.Doc via the Notes protocol, you can "lock up" or "hang" (the hour glass will continue to display and you won't be able to continue working). This can occur under the following conditions:

- Performing a Save As from Windows Explorer via the Notes protocol.
- Saving or opening a document within an integrated application via the Notes protocol.
- Choosing Edit Document from within Notes.

If this occurs, you'll have to exit Notes (if it is running), then access the Task Manager and shut down the integrated application, then restart the application you were working in and retry your action.

I can't eliminate JavaScript errors when using Internet Explorer

If you are seeing frequent JavaScript error messages when using Internet Explorer, verify your cache settings.

1. Access View - Internet Options, or Tools - Internet Options.
2. On the General tab, click the Settings button in the "Temporary Internet files section."
3. Set the "Check for newer versions of stored pages" option to "Every visit to the page."
4. Click OK and OK.
5. Refresh the browser (F5 or Refresh button).

I can't eliminate JavaScript errors when using Netscape Communicator

If you are seeing frequent JavaScript error messages when using Netscape Communicator, verify your cache settings.

If you are using Netscape 4.x:
1. Select Edit - Preferences.
2. Expand the Advanced category, then select Cache.
3. For "Document in cache is compared to document on network," select Never.
4. Click OK.
5. Refresh the browser (F5 or Reload button).

I can't see any file cabinets, binders, and documents

You will see only the file cabinets, binders, and documents that you have access to. Check with the Administrator or File Cabinet Manager to verify your user access.

I can't send a mail message when I invite a user to a file cabinet

If you are accessing Domino.Doc through a Notes client, you will not be able to send mail messages when inviting users to a file cabinet if your Domino.Doc server does not replicate its Public Name and Address Book with other servers in your domain.

Add the address book to the NOTES.INI file in the `names=` line.

I get an error message when I open an edited binder profile

After checking out a binder profile, editing it, and checking it back in, you may see a "Document has been deleted" error when trying to open the binder.

Refresh the view that displays the list of binders.

I can't download any files from Internet Explorer

If you are using Internet Explorer to access a secure site (HTTPS protocol), you may get an error message, or the browser may just leave the File Download box open and not do the download, when you try to open a document.

1. Choose View - Internet Options or Tools - Internet Options.
2. Click the Advanced tab.
3. Scroll down to the Security section.
4. Remove the check mark from the box for "Do not save encrypted pages to disk."
5. Click OK.

General issues

These problems may occur on any one of the integrated applications.

- A document cannot be opened multiple times.

  For details, see "A document cannot be opened multiple times" later in this chapter.

- Domino.Doc library cannot be accessed.

  For details, see "Domino.Doc library cannot be accessed" later in this chapter.

- File Open error requires document check-in.

  For details, see "File Open error requires document check-in" later in this chapter.

- Opening a document from a browser fails and causes security warning.

  For details, see "Opening a document from a browser fails and causes security warning" later in this chapter.

- Saving a document after initial save may fail.

  For details, see "Saving a document again after initial save may fail" later in this chapter.

A document cannot be opened multiple times

Domino.Doc does not allow you to open a document that is already open; that is, if you have a document open, you cannot open it a second time. If you try, you will get a message informing you that the document is already open.

Domino.Doc library cannot be accessed

If you cannot connect to the Domino.Doc library through your ODMA-supported application, have your System Administrator check the following:

- Domino.Doc Server Software version

  The Domino.Doc 3.5 Client works only with the Domino.Doc 3.1 Server. You may be trying to access an older version of the server software via Notes if you receive the following message: "Domino.Doc Server was not able to perform request. Verify that you have appropriate access to perform this operation," or if you receive the following message when trying to access the library via HTTP protocol: "HTTP error communicating with server."

- Location of NOTES.INI file

  If, when you try to access your Domino.Doc library via Notes, you receive a message stating "Unable to find the library or server," Domino.Doc may not be able to find your NOTES.INI file. Domino.Doc looks for a NOTES.INI (not *anything*.ini) first in the Notes directory, then in the Windows directory. To access Domino.Doc from Notes, ensure that the NOTES.INI file for your Domino.Doc client is called NOTES.INI, and that it is in either your Notes directory or Windows directory.

- Names entry in NOTES.INI

  If you are using a Cascaded Name and Address Book on your Domino.Doc client and server, and Domino.Doc cannot find users you've registered there, verify that the NAMES entry in the NOTES.INI file on your Notes client includes the name of your Cascaded Name and Address Book. Add the name if it is not included.

File Open error requires document check-in

When you choose File - Open in an ODMA-supported application, you will receive an error message if your application does not recognize the file type you are trying to open. For example, if you try to open a .WRI file in Word Pro, the following message displays: "The selected filter is not installed. Add the filter using Custom option during installation or see Readme for ordering supplemental filters."

The application then tries to close the document, but because Domino.Doc has already checked the document out, the Domino.Doc Check In dialog box displays and you are required to check the document back in, even though you have not edited it.

Choose Discard Changes in order to return your document to the original state. In order to make changes to the document, you will need to open it in the application it was created in or in an application that can read that file type.

Opening a document from a browser fails and causes security warning

When you first try to open a Domino.Doc document from a browser, you'll get a warning that there is a possible security hazard. The warning dialog asks "What do you want to do with this file?" and defaults the answer to "Save to disk," preventing your documents from opening. Change the setting to "Open it."

The warning dialog also defaults the option "Always ask before opening this type of document." To prevent this warning from appearing every time you try to open a Domino.Doc document from a browser, click this setting to deselect it.

Saving a document again after initial save may fail

If you create a new document, save it to Domino.Doc, and continue working on the document, under certain circumstances (if your network goes down, for example) you may not be able to save your changes to Domino.Doc. If you get an error when trying to save the document again, save it to the file system and check it into Domino.Doc through your browser or Notes.

Known ODMA application issues

ODMA-supported applications support standard specifications for how a desktop application works with a document management system like Domino.Doc. Because the ODMA support is implemented slightly differently from application to application, the results are not always as expected. In testing Domino.Doc, we discovered some issues with the following applications.

- Freelance Graphics 97
- Freelance Graphics Millennium Edition Release 9.5
- PowerPoint Office 97
- Word
- Word Pro 97
- Word Pro Millennium Edition Release 9

Freelance Graphics 97 application issues

The following issues have been identified when working with Domino.Doc in Freelance Graphics 97.

- Closing after saving a presentation does not initiate check-in.
- Closing a presentation opened from a browser or Notes does not initiate check-in.
- Opening from or saving a presentation to the file system fails.
- Opening or reopening a presentation fails.
- Opening a presentation from a browser or Notes causes an error.
- Trying to connect to Domino.Doc via Notes protocol fails from Freelance Graphics.

Closing after saving a presentation does not initiate check-in

When you save a new presentation to Domino.Doc, and close it, the Domino.Doc Check In dialog box does not appear. Since your presentation does not get checked in, it appears in the Domino.Doc library list of checked-out documents. It also appears in the file cabinet with a "-(New)" notation.

To make it available, you'll need to check it into Domino.Doc through your browser or Notes.

For more information, see "Checking in a document from a browser" in Chapter 7, "Working with Domino.Doc from a Browser" and "Checking in a document from Notes" in Chapter 6, "Working with Domino.Doc from the Notes client."

Alternatively, you can exit Freelance Graphics, open it again, open the document, then close the document. This time the Check-in dialog box will display.

Closing a presentation opened from a browser or Notes does not initiate check-in

Changes made to a presentation that was opened from the Domino.Doc library via your Web browser or Notes, will need to be saved to the file system and the presentation must be checked back into Domino.Doc through the browser or Notes. At that point, Domino.Doc will present the name of the file.

Opening from or saving a presentation to the file system fails

When you attempt to open an existing Freelance Graphics 97 presentation from the file system, the Freelance Graphics Open dialog box does not appear. Similarly, when you create a new presentation in Freelance Graphics 97 and try to save it to the file system, the Freelance Graphics Save dialog box does not appear and your presentation cannot be saved to the file system.

You need to disable Domino.Doc by performing the following steps:

1. Choose File - User Setup - Freelance Preferences.

   The Freelance Graphics Preferences dialog box displays.

2. Remove the check mark beside the "Disable System" option.

3. Click OK.

Now you will be able to save the presentation to the file system.

Alternatively, you can change the Application Preferences setting in the Domino.Doc Desktop Administrator.

Opening or reopening a presentation fails

When you try to open a presentation that you've already opened (or tried to open) during the current session, you may get a message stating that the file already exists and asking if you want to overwrite it, or you may get a warning that the file does not exist.

Both situations occur because Freelance Graphics 97 maintains information about the document and bypasses certain ODMA calls from Domino.Doc.

In order to be able to open your document, exit Freelance Graphics 97 and restart the application. At this point, you will be able to successfully open your presentation.

Opening a presentation from a browser or Notes causes an error
If you saved a presentation with a space anywhere in the path name, you will get an error message stating that the file cannot be found when you open the presentation from Domino.Doc via your Web browser or Notes.

- If your file name contains a space:

    Close the message box and using Explorer, navigate to the file that has been downloaded to your Domino.Doc temp directory (c:\lotus\dominodoc\temp). Rename the file, removing the space. Then return to your browser or Notes and check in the presentation. The file location with the original file name appears on the Domino.Doc Check In dialog box. Make the same name change you made in Explorer and click Check In.

- If your path contains a space:

    Open your NOTES.INI file, find the line "$DominoDocDir" and change the path name to an existing directory that does not contain a space.

Trying to connect to Domino.Doc via Notes protocol fails from Freelance Graphics
If, when working in Freelance Graphics, you are having problems trying to connect with Domino.Doc via the Notes protocol, check for multiple versions of NOTES.INI files.

Domino.Doc looks for NOTES.INI (not *anything*.ini) first in your Windows directory and then in the Notes directory. If you are running multiple versions of Notes and use different NOTES.INI files for each, you need to select the appropriate .INI, ensure it is named NOTES.INI, and place it in either the Windows or Notes directory.

Freelance Graphics Millennium Edition Release 9.5 application issues

The following issues have been identified when working with Domino.Doc in Freelance Graphics Release 9.

- Closing after saving a presentation does not start check-in.
- Closing a presentation does not start check-in.
- Disabled Document Management and cannot get it back.
- Opening a presentation from or saving it to the file system fails.
- Opening or reopening a presentation in the current session fails.

Closing after saving a presentation does not start check-in
When you save a new presentation to Domino.Doc and close it, the Domino.Doc Check In dialog box does not appear. Because your presentation does not get checked in, it appears in the Domino.Doc library list of checked-out documents. It also appears in the file cabinet with a "-(New)" notation.

To make it available, you'll need to check it into Domino.Doc.

Alternatively, you can exit Freelance Graphics, open it again, open the document, then close the document. This time the Check-in dialog box will display.

Note Upgrading to Millennium 9.5 also resolves this problem.

Closing a presentation does not start a check-in
Changes made to a presentation that was opened from the Domino.Doc library via your Web browser or Notes, will need to be saved to the file system and the presentation must be checked back into Domino.Doc through the browser or Notes. At that point, Domino.Doc will present the name of the file.

Disabled Document Management and cannot get it back
If you disabled document management from within Freelance Graphics Release 9 (by choosing File - User Setup - Freelance Preferences, then checking Disable Document Management System) the checkbox is removed from the preferences dialog box.

In order to re-enable document management in Freelance Graphics Release 9, you need to change this registry key:

HKEY_CURRENT_USER/Software/Lotus/Freelance/98.x/Freelance Graphics/Disable ODMA

Change it to 0 (zero).

Note Upgrading to Millennium 9.5 also resolves this problem.

Opening a presentation from, or saving it to, the file system fails
When you attempt to open an existing Freelance Graphics Release 9 presentation from the file system, the Freelance Graphics Open dialog box does not appear.

Similarly, when you create a new presentation in Freelance Graphics Release 9 and try to save it to the file system, the Freelance Graphics Save dialog box does not appear and your presentation cannot be saved to the file system.

You need to change the Application Preferences setting in the Domino.Doc Desktop Administrator.

Note Upgrading to Millennium 9.5 also resolves this problem.

Opening or reopening a presentation in the current session fails
When you try to open a presentation that you've already opened (or tried to open) during the current session, you may get a message stating that the file already exists and asking if you want to overwrite it; or, you may get a warning that the file does not exist.

Both situations occur because Freelance Graphics Release 9.5 maintains information about the document and bypasses certain ODMA calls from Domino.Doc.

In order to be able to open your document, exit Freelance Graphics Release 9.5 and restart the application. At this point, you will be able to successfully open your presentation.

PowerPoint application issues

The following issues have been identified when working with Domino.Doc in PowerPoint.

- A temporary file gets created for each new presentation.

  For details, see "A temporary file gets created for each new presentation" later in this chapter.

- Closing a presentation opened from PowerPoint does not start check-in.

  For details, see "Closing a presentation opened from PowerPoint does not start check-in" later in this chapter.

A temporary file gets created for each new presentation
When you create a new presentation, a temporary file (DDM####.ppt) is also created in the DominoDoc/temp directory. When the presentation is saved and checked in, the temporary file does not get deleted.

You may want to periodically delete these temporary files to free up disk space on your system.

Closing a presentation opened from PowerPoint does not start check-in
If you have trouble launching PowerPoint or checking in presentations, you may have an early version of PowerPoint. Either upgrade to PowerPoint 2000, or change the default value of PowerPoint Open from N to Y. Changing this default in the registry entry will allow you to save the document from PowerPoint directly into Domino.Doc.

Procedure

To change the appropriate registry entry, perform the following steps:

1. From the Start menu, click Run.

2. Enter regedit in the space provided.

3. Open H_KEY_LOCAL_MACHINE/SOFTWARE/Lotus/Domino.Doc Desktop Enabler.

4. Select PowerPoint Open.

    The Edit String dialog box appears.

5. Modify the (Default) value by changing the value from N to Y.

6. Click OK.

7. Close the Registry Editor window.

Word application issues

The following issue has been identified when working with Domino.Doc in Word:

A temporary document file does not get deleted

The temporary documents that get created along with new documents do not get deleted under the following circumstances:

*   When you create a new document, a temporary file is also created in the Domino.Doc/temp directory. If you close the application using the Close icon in the right-hand corner of the workspace, and check the document in, the temporary file does not get deleted.

    To automatically delete the temporary file when you save and check in a document, use File - Close instead.

*   When you check out and edit a document and save it with a different name using File - Save As, Domino.Doc prompts you to check in the original document. If you check in the original document at this point, the temporary file does not get deleted.

Periodically check your temp directory and delete any temp files to free up disk space on your system.

Word Pro 97 application issues

The following issues have been identified when working with Domino.Doc in Word Pro 97.

*   Exiting the application after saving multiple documents prompts to check in only the first.

    For details, see "Exiting the application after saving multiple documents prompts to check in only the first" later in this chapter.

- Saving a document may fail for File Cabinet Editors.

  For details, see "Saving a document may fail for File Cabinet Editors" later in this chapter.

- Saving a document after canceling a previous save terminates Word Pro 97.

  For details, see "Saving a document after canceling a previous save terminates Word Pro 97" later in this chapter.

Exiting application after saving multiple documents prompts to check in only the first

When you exit the application after saving multiple documents, you will be prompted to check in only the first. The other documents will display in the Domino.Doc library list of checked out documents.

To make these documents available, you'll need to check them in to the library through your browser or through Notes.

To check in all documents through Word Pro 97, close the application after saving each document.

Saving a document may fail for File Cabinet Editors

If you have turned off the Word Pro 97 setting to Disable Small File Format, you may experience issues when saving a document to Domino.Doc. This will happen only if you do not have File Cabinet Manager or Administrator access.

If you are an Editor of the file cabinet and you have issues saving a document, do the following to be able to save the document to Domino.Doc:

1. Launch Word Pro 97 and choose File - User Setup - Word Pro Preferences.
2. Drop down the Disable list and choose Disable Small File Format.
3. Click OK.

Saving a document after canceling a previous save terminates Word Pro 97

If you save a new document to Domino.Doc using File - Save after canceling a previous File - Save, your document will be saved in the Domino.Doc library, but not checked in, and Word Pro 97 will terminate. To avoid this, choose File - Save As instead of File - Save.

Word Pro Millennium Edition Release 9 application issues

The following issues have been identified when working with Domino.Doc in Word Pro Release 9.

- Saving a document after canceling a previous save terminates Word Pro Release 9.

- Saving a document may fail for a File Cabinet Editor.

Saving a document after canceling a previous save terminates Word Pro Release 9

If you save a new document to Domino.Doc using File - Save after canceling a previous File - Save, your document will be saved in the Domino.Doc library, but not checked in, and Word Pro Release 9 will terminate. To avoid this, choose File - Save As instead of File - Save.

Saving a document may fail for a File Cabinet Editor

If you have Enabled Small File Format saving, you may experience issues when saving a document to Domino.Doc. This will happen only if you do not have File Cabinet Manager or Administrator access.

If you are an Editor of the file cabinet and you have issues saving a document, do the following to be able to save the document to Domino.Doc:

1. Launch Word Pro and choose File - User Setup - Word Pro Preferences.

2. Click the Enable tab and deselect the Small File Format option in the Performance list box.

3. Click OK.

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